Nova Scotia
Department of
Agriculture and Marketing

Annual Report

for the fiscal year ending March 31, 1991

Marketing Services Branch

92-01986/

Table of Contents

ANNUAL REPORT - April 1st, 1990 – March 31st, 1991

Introduction 1
Diagram of Staff 2

MARKETING INFORMATION & REGULATIONS

1. **Information & Regulations** 3
   David M. Smith, Marketing Specialist
2. **Marketing Research** 6
   Scott Hosking, Market Research/Analyst
3. **N.S. Natural Products Marketing Council** 9
   Stuart F. Allaby, Chairman – G. Brian Smith, Secretary
4. **Federal/Provincial Agriculture Trade Policy Committee** 12

MARKET DEVELOPMENT

1. **Canada/Nova Scotia Agri-Food Development Agreement (AFDA)** 14
2. **Federal/Provincial Market Development Council** 15
3. **Trade Fairs & Conferences** 17
4. **Livestock** 18
   Raymond P. Foote, Marketing Specialist
5. **Fruits & Vegetables** 26
   Peter J. Rideout, Marketing Specialist
6. **Foodservice** 30
   Linda D. MacDonald, Marketing Specialist
7. **Promotion** 37
   K. Laurie Sandeson, Marketing Specialist

AUDIO VISUAL

1. **Audio Visual Production/Technology** 49
   Sheila J. Ferguson, Information Officer
2. **Graphic Design** 54
   Cheryl Kienzle, Graphic Artist
3. **Radio/Audio Visual Services** 57
   Micheline Gibson, Audio Visual Technician

1990-91 Annual Report

Marketing Services Branch

Agricultural Services Division

This annual report provides an overview of the activities of the Marketing Services Branch for the period April 1, 1990 to March 31, 1991. The report is made in three sections representing Market Information and Regulations, Market Development and Audio-Visual Services. Each person within these sections has reported the major responsibilities for which they are proficient.

The Branch is indebted to the secretarial staff within the Administration Section, for without the services of Dawn MacKay, Elinor Maher, Sharon McLean and Mary Paquet the Branch would not function effectively.

The Nova Scotia Department of Agriculture and Marketing was restructured in February 1990. Therefore, this report represents the first full year under which the Branch has operated within the new Agricultural Services Division, with Mr. Rollie Hayman as Executive Director. This was a productive year, and we wish to thank Mr. Hayman for his co-operation.

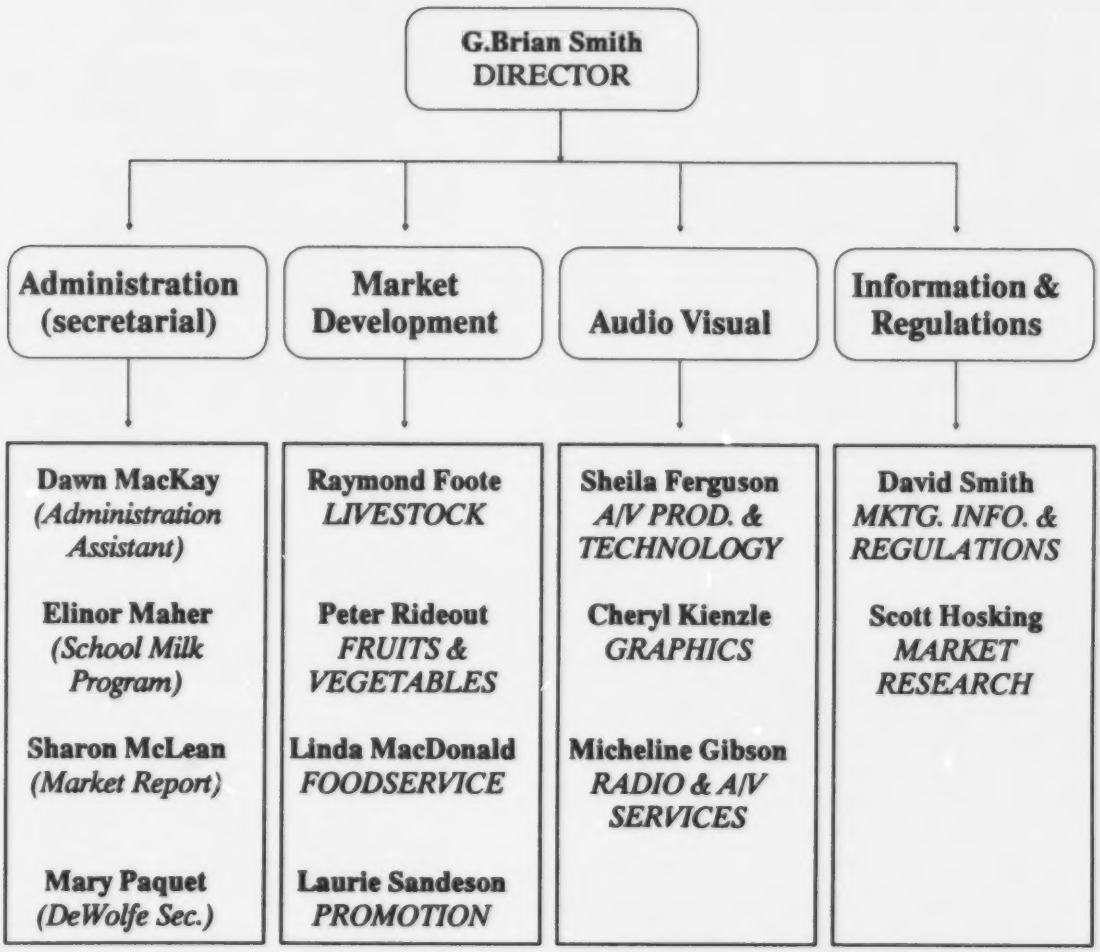
Co-operation is key for the future of the agri-food industry of Nova Scotia. Reported within this document are various examples of co-operative developments among Departments, producers, marketing boards, processors, the food industry, and the trade. Our staff are proud to nave played a role in this process.

Finally, we wish to recognize the team on which we play, namely, the Department of Agriculture and Marketing and all its staff, and give particular thanks to our Deputy Minister, Mr. Ralph Morehouse, for his wise guidance.

Respectfully submitted,

G. Brian Smith
Director

N.S. DEPT. OF AGRICULTURE & MARKETING
Marketing Services Branch - 1990 to 1991



Marketing Information & Regulations

Information & Regulations

David M. Smith, Marketing Specialist

I. MARKET INFORMATION

Market Report - This bi-weekly report of Nova Scotia and related agricultural product prices is mailed to approximately 1550 producers and agri-business interests. The report also includes random commentary relative to agricultural industry markets.

As in other years, a composite of the year's prices of the high-profile items is prepared and mailed along with a late-February issue of the Market Report. This annual composite has proved useful in answering requests for multi-year historic information on specific products.

The accuracy of our wholesale paying price quotes was challenged on one occasion. This is to be expected as individual sales will differ from time to time. These quotes are designed to be yardsticks only. It should be noted, we are the only known agency reporting wholesale paying prices on a regular basis.

Activity Report - Assisted in summarizing Weekly Reports of Branch members into an Activity Report directed to other Branch directors.

Attache Tour - In June, the Branch hosted a tour of foreign agricultural attaches based in Ottawa. Wherever possible we exposed them to agricultural producers who had interests in international markets, e.g. producers of fruits and vegetables, strawberry plants, peat moss, and purebred cattle.

Other - This office continued to receive requests for price and supply information on low-volume products which are about to enter the market and are not otherwise reported.

II. SCHOOL MILK PROGRAM

The School Milk Program continues to be well established in Nova Scotia schools as 538 of an eligible 561 schools participated. This is one school less than last year but out of a total of six less schools eligible.

The price to the student was raised from 20 cents to 30 cents per 250 ml serving resulting in a total contribution to the Program by the Department of Agriculture & Marketing of $1.159 million. This was the first student price increase since 1986.

This year a written policy was prepared defining the program and its purpose. This will be a useful reference which will spell out all aspects of the Program.

Milk Nova Scotia, the industry-operated promotional arm of the dairy industry, continued in an active program of milk promotion in the schools. One of their projects was to examine the

acceptance of chocolate milk as a possible addition to the program. Results are inconclusive at this time.

Seasonal Tariff

Seasonal tariff is applied by Revenue Canada on imported fruits and vegetables when Canadian production is marketed.

This office continued as Maritime zone advisor as to the appropriate time to apply and remove these tariffs.

In 1990-91 the following tariffs were utilized:

Seasonal Tariff Utilization – Maritime Zone

	Applied		Cancelled	
Beans	7/27		10/11	
Beets	7/20		3/31	
Broccoli	7/20		11/9	
Cabbage	7/20	1/25	10/11	3/31
Carrots	8/10		3/31	
Cauliflower	7/20		11/16	
Cherries, Sour	8/10		10/11	
Corn-on-Cob	8/10		10/11	
Cucumbers	4/3		10/29	
Lettuce, Head	7/20		10/5	
Onions, Green	7/20		12/14	
Onions, other	8/10		3/31	
Peas	7/20		10/12	
Plums	8/17		9/20	
Tomatoes	5/15		10/11	

We were advised by Hort. Council of several duty drawback requests by Canadian processors importing raw product, however none of these could be serviced with Maritime Zone production.

We encountered a discrepancy in the harmonization of tariff schedules between Canada and the U.S. This was discovered by a N.S. strawberry plant exporter who found that the classification numbers on the two schedules do not correspond and further, the tariff into the U.S. was 5.5% whereas the Canadian tariff was free. Through the co-operation of a U.S. Customs Ruling Officer the situation was temporarily relieved.

Until an official amendment is made, Canadian exporters are advised to invoice strawberry plants as "bushes".

III. REGULATIONS

As administrator and advisors to our Minister's office regarding the Nova Scotia Fresh Fruit & Vegetable Regulations we maintained a close liaison with the federal inspectors who enforce these regulations.

During the year we handled inquiries as to the interpretation of our regulations and from producers who are preparing their products for market.

During the year, there were 48 detentions imposed by the inspectors as a result of sub-grade

produce. The products affected were mostly apples and a few lots of potatoes. These were subsequently regraded, culls removed and released for sale.

We assisted the Nova Scotia Fruit Growers Association in the interviews and hiring of a replacement fruit inspector. Out of the nine applicants interviewed David Bowlby, Berwick was selected and hired. We then worked briefly with Mr. Bowlby in the interpretation of our Regulations.

We worked with the apple industry in their continuing search for a suitable returnable fibreglass container for shipping bagged apples. Because of the excessive expense in developing and producing a mould, the challenge is to create a container that will serve several products.

This year an additional apple grade "Nova Scotia Select" has been added to the N.S. Fruit & Vegetable regulations. This was done at the request of the NSFGA to accommodate undersized Cox Orange & Russet varieties.

A strawberry processor encountered grade problems due to non-uniformity of size. This problem has been relieved by a change in the CAP Act regulations.

The interprovincial movement of a stew pack of mixed vegetables packed in N.B. and sold in N.S. has caused some controversy. The package carries no grade designation therefore Agriculture Canada absolves themselves of any responsibility, yet our regulations demand that all packages be marked with a grade. They were therefore detained at N.S. retail outlets by CCA inspectors. We supported these detentions as our N.S. stew pack shippers are required to adhere to these regulations.

As well as the mentioned stewpack, our Minister approved the experimental canner grade for tomatoes, and mini grade for early potatoes.

IV. SPECIAL PROJECTS

Fresh Blueberry Groups - We continued our close liaison with producers of fresh low-bush blueberries destined for local markets. This consisted of a pre-market meeting in June and a post market meeting in October. Producers showed continued interest in these meetings as they provide useful market information. These meetings are also useful in co-ordinating promotional programs.

Oyster Mushrooms - Worked with Hal Ju, N.S.A.C. in his ongoing research in the production and marketing of oyster mushrooms. As this is a relatively new item on the Canadian diet, it was found that continued promotion is necessary to encourage their introduction and awareness.

Garlic Market - Worked with a new grower of garlic who wanted market potential information on this product. At the moment, his production is too low to actively persue marketing. His plans include a sizeable expansion.

Hay Market - We aligned ourselves with a hay marketing group as they attempted to expand their market. Their problem is getting adequate supply and maintaining quality. Also competition is demanding more economical baling which demands improved equipment.

Hort. Council - For the 25th consecutive year we attended the annual meeting of the Canadian Horticultural Council. There we served on several committees.

Marketing Research

Scott Hosking, Market Research/Analyst

INTRODUCTION

The report to follow outlines the major initiatives and program activities undertaken by this office in the area of market research. The report will begin with a review of the duties and responsibilities of the market research/ analyst, followed by a discussion of the activities carried out for the period April 1, 1990, to March 31, 1991. The activities are categorized in the following manner:

I) General Duties and Responsibilities
II) Market Information
III) Market Research
IV) Special Conferences, Events and Seminars

* It must be noted that this position was vacant from mid October, 1990, until April 2, 1991.

I. GENERAL DUTIES AND RESPONSIBILITIES

The general duties of this office include responsibility for the Branch's programs and services as they relate to agricultural marketing research and agricultural market and economic analysis: to aid the Department and the Nova Scotia agri-food industry in planning, designing, implementing and interpreting market research and analysis as it pertains to the agri food industry. This involves the review and assessment of current research and its relevance to the Nova Scotia agri-food industry, as well as responding to the needs of our marketing specialists in the area of marketing research.

The bulk of the projects and activities undertaken by this office have been initiated by the specialists within the Branch and encompass a wide range of topics and commodities.

II. MARKET INFORMATION

The Marketing Services Branch is one of the primary sources of timely market information for the agriculture industry and has thus made a substantial commitment to the provision of market information.

Remote Bulletin Board System

The electronic information service, the NSDAM Remote Bulletin Board System, has been improved over the year with many of the technical difficulties eliminated.

The RBBS has been upgraded from a 16.1A version to 17.2A version. This permits the addition of external protocols. Clients can now download data (rather than just read it) and request worksheet files and executable programs.

We continue to receive approximately 100 calls/month

Vegetable Handbook

The Vegetable Handbook information was updated.

III. MARKET RESEARCH

Fox Market Study

In April, 1990 the market development study of the Nova Scotia fur industry was completed. The projects objectives were to:

1) Identify the usage of Canadian Silver Fox by manufacturers, retailers, and wholesalers.
2) To identify a profile of the consumer currently purchasing silver fox garments.

A survey of retailers, manufacturers, and brokers attending the International Fur Fair in Montreal was conducted during May 2-6.

Armstrong Select Nova Scotia Beef Evaluation

The project to evaluate the Armstrong Select Nova Scotia Beef Pilot Project was completed. The objectives of the project were to evaluate:

1) consumer overall acceptance.
2) consumer trail and repurchase
3) consumer awareness of the branded product.

The project involved a four phased process:

1) Survey sampling - to determine consumer preferences and provide samples for the telephone follow up.
2) Telephone surveys - to gain information on in-home trial and overall acceptance and repurchase attention.
3) Blind taste test - consisted of a blind taste test to evaluate comparable cuts of western and Armstrong Select Nova Scotia Beef.
4) Evaluation of beef by consumers attending Harvest Food Fest '90.

Pork Nova Scotia

This office along with Pork Nova Scotia conducted a consumer study to aid in directing Nova Scotia pork promotional activities. The objectives of the project were to determine the consumers consumption patterns, decision criteria, the identification of preparation methods, and perception of pork.

Specialty Food Product Market Study

This office was involved with Federal-Provincial Market Development Council commissioned study of the Specialty Food Industry. The objectives of the project were to:

1) Investigate the structure, product lines, and output of existing manufacturers of specialty food products and the markets they serve.
2) Prepare an overview of the specialty food markets in the U.S. and Canada with particular reference to channels of distribution.

3) Investigate barriers and impediments to the further development of the Canadian specialty food industry.

4) Develop and recommended marketing strategy for the Federal Provincial Market Development Council and its Affiliated ministries, both federal and provincial.

The recommendations of the report are now being considered to determine future strategy in the industry.

Food Service Market Study

The research project, co-ordinated by this office and the Foodservice Specialist, was completed. The study provides the following:

1) A review of the size of the industry.

2) A determination of sources and specifications of products used.

3) An examination of purchasing practises.

Harvest Food Fest - Sensory Evaluation

This office assisted the foodservice specialist by tabulating and analyzing data received from taste panels at the Harvest Food Fest.

IV. SPECIAL CONFERENCES, MEETINGS AND SEMINARS

International Fur Fair - Montreal, May 2-6, 1990

This office attended the Montreal Fur Fair to conduct the survey for the fox market study, of retailers, manufacturers, and brokers attending the fair.

Nova Scotia Natural Products Marketing Council

Stuart F. Allaby, Chairman
Brian Smith, Secretary

Under the authority of the Natural Products Act, the Natural Products Marketing Council supervises the activities of the eleven agricultural commodity marketing boards listed below:

Nova Scotia Wool Marketing Board
Pork Nova Scotia
Nova Scotia Chicken Marketing Board
Nova Scotia Egg and Pullet Producers Marketing Board
Nova Scotia Turkey Marketing Board
Nova Scotia Flue-Cured Tobacco Growers Marketing Board
Nova Scotia Pea and Bean Growers Marketing Board
Nova Scotia Grain Marketing Board
Nova Scotia Potato Marketing Board
Nova Scotia Greenhouse Vegetable Marketing Board
Nova Scotia Evening Primrose Marketing Board

Members of Council for 1990-91 were: Stuart F. Allaby, Chairman; Harold Lusby; Laurie Hennigar; Donald Gunn; Alfred Scothorn; Sue Cleary replaced Jonathan Davies as legal counsel; George Smith, a special advisor on the feather industry; and Brian Smith, Secretary.

Council met six times during the year to deal with commodity regulations, commodity plans and amendments.
Council heard two appeals: (1) Meredith Farms Ltd. versus Pork Nova Scotia; and
(2) John Fuller versus Nova Scotia Turkey Marketing Board.

Atlantic and National Meetings

The Chairman, Secretary and legal advisor attended a National Farm Products Marketing Council/Supervisory Board seminar on October 3-4, 1990 in Port Stanton, Ontario. Program topics were: (1) CEMA update; (2) Poultry Task Force report by Agnes Jarnuskiewicz; (3) Canadian Chicken Marketing Agency update; (4) Canadian Turkey Marketing Agency update; and (5) Canadian Broiler Hatching Egg Marketing Association update.

A meeting of the Atlantic Supervisory Boards was held in Charlottetown, P.E.I. Topics for discussion were update on GATT and FTA talks. The meeting was attended by Council member Alfred Scothorn.

An Atlantic Signatories meeting was held in Moncton on Nov. 13, 1990. This meeting was called to deal with the intention of Ontario and Quebec to withdraw from the surplus removal program; dormant quota; Poultry Task Force report; and the Technical Committee report.

Council Chairman attended a signatory meeting in Ottawa December 11, 1990 to deal with (1) the Canadian Egg Marketing Agency situation regarding dormant quota; (2) Quebec and Ontario's notice to withdraw from the egg surplus removal program; (3) GATT update; and (4) CEMA Vision 2000.

Nova Scotia Egg and Pullet Producers Marketing Board

The Nova Scotia Board, as well as all egg boards in Canada, are responding to initiatives set out by the Minister of Agriculture for Canada. Many meetings were held dealing with implications of the recommendations of the Task Force appointed by the Minister, as well as the controversy surrounding CEMA's surplus removal program.

Nova Scotia Turkey Marketing Board

The past year was considered a growth year for our turkey producers. The pricing formula initiated in 1989 seems to be working fairly well. Producers have concerns for effects from CUSTA agreement and the final outcome.

Nova Scotia Chicken Marketing Board

It is important to note that no price arbitration meetings were necessary during 1990. Council again chaired the all industry group of processors, wholesalers, retailers and fast food industry representatives on behalf of the Board. These meetings appear to be very worthwhile. Discussions were held with the Board regarding the quota allocation criteria for chicken.

Nova Scotia Potato Marketing Board

Council approved for 1990 the Price Advisory Committee for table potatoes. The committee was recommended by the Nova Scotia Potato Marketing Board and the Atlantic Fresh Produce Association, and consisted of the following: Stuart Allaby, Chairman; Brian Morse, producer; Earl Kidston, packer; Donald Rhyno, retail; Darrel Keddy, wholesale; Sonya MacKillop, Secretary; and Brian Smith. Added to the 1990 committee were Gordon Spurr and Rick Burt.

The committee met five times via the telephone conference system. Factors considered were market supply, growing conditions, quality, and imports availability. The price advisory information appeared to be valuable early in the harvesting of Nova Scotia potatoes. There is still some interest in a national potato plan.

Nova Scotia Pea and Bean Marketing Board

Agreement on price was not settled by growers and processors. Therefore, under section 604(a) of the regulations, the matter was referred to Council Chairman for arbitration. It was not necessary to hold formal negotiation for the bean price.

Pork Nova Scotia

Considerable time was spent by Council dealing with changes to the regulations, new licensing clauses, and regulations dealing with booking and shipping.

Nova Scotia Grain Marketing Board

Findlay MacRae became Secretary Manager of the Board on Aug.15, 1990. Council dealt with changes to regulations.

Nova Scotia Fruit Growers Association

There is still considerable interest in a national apple agency. A request for an agency was made in February 1990 to the Minister of Agriculture. Public hearings were held across Canada

with a meeting in Kentville on August 9, 1990. The Nova Scotia Council chaired a quota allocation committee with one meeting to date. There is still a question as to how the fruit growers can participate without a positive vote.

Nova Scotia Greenhouse Vegetable Marketing Board

The Board is still formulating regulations regarding (1) license; and (2) price negotiation committee structure. The Board is communicating with the New Brunswick and Prince Edward Island boards re Maritime common interests.

Nova Scotia Flue-Cured Tobacco Marketing Board

Council dealt with regulation changes re quota.

Nova Scotia Wool Marketing Board

Serves as market advisory board to the industry. Wool prices during 1990 were lower than previous year.

Nova Scotia Evening Primrose Marketing Board

Inactive during last three years. Council recommended that this Board be revoked, after polling former producers.

1990-91 Annual Report from the Federal/Provincial Agriculture Trade Policy Committee

Report on Activities in 1990-91

In pursuing its mandate, the Committee met five times between August 1990 and July 1991 under the co-chairmanship of Agriculture Canada and the Ontario Ministry of Agriculture and Food for the provinces. The following issues and activities were addressed during the course of the year.

Memorandum of Understanding on Interprovincial Barriers to Trade

In August 1990 in Moncton, federal and provincial Ministers of Agriculture agreed in principle to a second to a second Memorandum of Understanding on eliminating interprovincial trade barriers. Ministers agreed, in light of the Agri-Food Policy Review, that efforts of provinces and the federal government in this regard would be focused on barriers created by technical regulations. It also was agreed that "At the first annual review, Ministers will assess the operation of the dispute settlement process as it has been applied to technical barriers and will consider whether in light of this experience and consistent with the results of the Agri-Food Policy Review it is timely to apply it to the resolution on non-technical barriers". Ministers set out a program of work to be conducted and co-ordinated by the FPATPC and the Federal/ Provincial Agri-Food Inspection Committee (FPAFIC).

The FPATPC undertook the following work:

- a register of contact points was established for the exchange of information on new or revised legislation or regulations which could adversely affect interprovincial trade;
- a set of guidelines was designed to govern the process of settling disputes which may arise between governments over technical barriers to trade;
- most provinces have provided nominees towards the creations of a roster of individuals to serve as independent panelists win the dispute settlement mechanisms; and
- a means for sharing the cost of settling disputes through the use of the independent panelists was developed.

Consistent with its mandate to oversee the work on interprovincial trade barriers, the Committee met with the FPAFIC to initiate work towards the development of national technical standards. As indicated in its Annual Report to Ministers, the FPAFIC has made considerable progress by working through and resolving many of the technical barriers identified by the FPATPC. The Committee continues to work with the FPAFIC to eliminate or reduce technical barriers to interprovincial trade.

Domestic Policy Developments and Trade

The Committee identified and discussed the trade related aspects of a number of a number of domestic agriculture policy processes and developments including:

- the potential that GRIP and NISA may be subject to countervailing duties vis-à-vis current and potentially revised GATT countervailing duty laws and subsidy disciplines;
- the proposed National Marketing Agency for apples; and
- the Federal Government Dairy Task Force.

Uruguay Round of Multilateral Trade Negotiations

The Committee continued to serve as a forum to discuss Uruguay Round developments and Canada's approach to agriculture in the negotiations.

Canada-U.S. Trade Agreement

The Committee continued to serve as an informal means to monitor and broadly assess the implementation of the Canada-U.S. Free Trade Agreement (FTA). The Committee discussed several FTA related issues including:

- Canadian FTA Appeals and U.S. Extraordinary Challenge re: U.S. countervailing duties on Canadian pork;
- U.S. delays in implementing border meat inspection experiment and related issues in Canada;
- removal of Canadian Wheat Board import licenses for wheat; and
- progress of technical working groups under Article 708.

Bilateral Trade Issues

The Committee discussed the implications of the following bilateral trade developments:

- GATT panel on U.S. countervailing duties on Canadian pork;
- CITT review of Canadian countervailing duties on EC beef;
- U.S. north-eastern border inspection program re: potatoes;
- increased imports of U.S. "no-roll" beef;
- concerning tariffs on U.S. Customs' decision on pulses; and
- U.S. 332 investigations on durum wheat, apples and alfalfa products.

North American Free Trade Negotiations

The Committee initiated federal-provincial dialogue on the timing, substance and possible outcomes of the North American Free Trade Negotiations. Committee members were invited to comment on a draft Agriculture Canada paper entitled "Canada-U.S.-Mexico Trade Negotiations and Agriculture: A Discussion Paper". Several provinces provided comments and recommendations.

Provinces-States Agricultural Accord

The Committee continued to serve a co-ordinating role for provincial participation in Accord related activities. A meeting of the Accord, originally scheduled for May 17, 1991 in Seattle, is being planned for August/September 1991. The main agenda items for the Accord meeting include an exchange of views, concerns and assessments of the North American Free Trade Negotiations and an assessment of the operation of the Accord.

Secretariat

A permanent Secretariat serves the Committee, in common with the Federal/Provincial Agri-Food Inspection Committee and the Federal/Provincial Market Development Council. Members of the Committee express their appreciation of the work of the Secretariat in managing and facilitating the Committee's activities.

Market Development

Canada-Nova Scotia Agri-Food Development Agreement (AFDA)

The Marketing Specialists continued to be involved in the implementation of AFDA's Market Development Program. Project approvals for the Market Development Program to March 31, 1991 are as follows.

Project Approvals	No. of Projects	Funds Committed	Expenditures*
Special Studies	35	$ 439,868	$ 226,781
Markets Information	26	395,284	209,653
Marketing Infrastructure	92	2,206,745	1,225,871
Product Development	45	639,199	232,554
Marketing Organization/ Development	8	350,000	59,845
Total	**206**	**$4,067,401**	**$1,984,704**

Federal/Provincial Market Development Council

In pursuing its mandate, the Council met five times between August 1990 and July 1991, in addition to several meetings of its various project sub-committees. The Chairman, Vice Chairman and Executive Secretary all have met regularly outside the regular meetings. The major issues addressed and activities conducted during the course of the year were as follows.

Specialty Food Products Market Study

A study of the market for specialty food products, initiated by the Council and financed and conducted jointly with Agriculture Canada, was completed and the final report presented to Council members and Departmental representatives in April 1991 and to the Canadian Specialty Food Association in May 1991. The May 1991 issue of "Food in Canada", editorial section, featured the study and its importance to the specialty food products sector.

Council is implementing recommendations arising from the study by: striking a Working Group to focus action; working with the Canadian Specialty Food Association to enhance that association's viability and central role for specialty food products operators; regular dissemination of information resulting from the study; development and dissemination of a Canadian Specialty Food Products Directory (possibly in electronic form); specific sector-related activities as appropriate.

Study of Market Development Opportunities Generated by Food Quality, Food Safety and Organic Considerations

The first phase of a project to identify and exploit marketing opportunities arising from food quality, food safety and organic food considerations, comprising a literature study in the organic sector, was completed in April 1991. Council members are evaluating the findings, prior to deciding on further action.

Analysis of U.S. Agri-Food Market Opportunities

Council has initiated an analysis of U.S. agri-food imports, to determine if Canada is effectively exploiting the agri-food market opportunities generated by the Canada-U.S. Free Trade Agreement. The study will identify those agri-food products which Canada could export in greater volume due to its geographical and tariff advantages over other international suppliers. The final report is scheduled for September 1991.

"Increasing Agri-Food Marketing Effectiveness" Seminar

The Council, in conjunction with The Financial Post Conferences, will sponsor and deliver a high-profile conference focused on competing successfully in the global marketplace, in Toronto on November 6, 1991. The target audience is farm leaders and senior food industry officials.

Mexico/NAFTA Seminars

The Council will sponsor and conduct seminars to inform Canadian agri-food exporters of potential export market opportunities in Mexico. A program focusing on the business environment in Mexico, experiences of exporters currently selling into that market and the impact of

a free trade agreement, will be held in western Canada in late November 1991. A similar seminar is planned for eastern Canada early in 1992. The seminars also will be used to develop a mechanism to co-ordinate and enhance future activities related to exporting to Mexico.

Regional Market Development Concept

One way greater collaboration can be fostered amongst Council members is jointly to co-ordinate common market development activities. Regional market development associations play a major role in U.S. industry/government trade development programs. Accordingly, the Council is exploring the concept of developing a pilot program in western Canada which will effectively combine similar, yet independent, provincial initiatives into a jointly-sponsored activity with federal government assistance, thus to provide a more active focus for trade development. The western provinces' participation in food shows such as Japan's "FOODEX" is a possible candidate for such co-operation.

Electronic Data Dissemination

The Council is working with Agriculture Canada to institute a joint system by which common market-related data will be shared electronically. This will enhance effectiveness and cost-efficiency as a result of the federal and provincial governments and industry working together in partnership.

What We Shall Do In 1991-1992

In 1991-1992 the Council will pursue a number of initiatives related to market awareness in a competitive trade environment, including implementation of several projects already initiated in 1990-1991. Close collaboration with other national and provincial initiatives of a similar nature will be a major priority. A planning session will be held in September 1991 to formalize a current work plan.

Trade Fairs and Conferences

Major trade fairs and conferences completed in 1990-91 include the following:

Trade and Conference Calendar

Marketing Services Branch, N.S. Dept. of Agriculture and Marketing – 1990 to 1991

Date	Event	Type	Location	Contact
Apr.	Hostex	Food Show	Toronto	Linda MacDonald
Apr.	Garden & Patio Show	Promotion	Halifax	Laurie Thompson
Apr.	New England NAMO	Conference	Mystic, Connecticut	Brian Smith
May	Taste of Nova Scotia	Conference	Halifax	Linda MacDonald
June	Canadian Dietetic Association	Conference	Ottawa	Linda MacDonald
June	Nova Scotia Chefs Association	Conference	Halifax	Linda MacDonald
July	Field Crops Expo'90	Conference	Nova Scotia	Laurie Thompson
July	National Agricultural Marketing Organization	Conference	Bethel, Maine	Brian Smith
Sept.	Harvest Food Fest	Promotion	Truro	Laurie Thompson
Sept.	Nfld. Agrifood Exhibition	Promotion	St. John's	Laurie Thompson
Oct.	National Farm Products Mktg. Council Supervisory	Seminar	Orillia	Brian Smith, Stuart Allaby
Oct.	Atlantic Winter Fair	Promotion	Halifax	Laurie Thompson
Oct.	Bakery Showcase '90	Promotion	Toronto	Peter Rideout
Oct.	NEBS	Info.	Boston	Laurie Thompson, Ray Foote
Nov.	ApEx Food & Beverage Show	Promotion	Halifax	Linda MacDonald
Dec.	Signatories Conference on Eggs	Info.	Ottawa	Stuart Allaby
Feb.	Boston Solo Food Show	Promotion	Boston	Brian Smith
Feb.	Canadian Meat Council	Conference	Toronto	Ray Foote
Feb.	Canadian Food & Beverage Show	Promotion	Toronto	Linda MacDonald
Feb.	Direct Marketing Conference	Conference	Parsippany, New Jersey	Laurie Thompson
Mar.	ApEx	Promotion	Halifax	Linda MacDonald
Mar.	Canadian Horticultural Council	Trade	Ottawa	David Smith
Mar.	Swing Into Spring	Promotion	Halifax	Laurie Thompson
Mar.	Natural Foods Expo West	Promotion	Anaheim, California	Laurie Sandeson
Mar.	WBANA Annual Meeting	Conference	Bangor	Brian Smith

Livestock

R. P. Foote, P.Ag.
Marketing Specialist

I. PROGRAM REVIEW: APRIL 1, 1990 TO MARCH 31, 1991

The projects and programs recorded in part reflect activities undertaken in food marketing, with a primary focus on red meats, poultry, dairy products, livestock marketing and markets information.

This office continued to act as budget manager for the Hog Transportation Policy. Secretariat Services continued to the EDP Liaison Committee and the Inspected Meat Plants Association of Nova Scotia. In addition, this office retained the role as Secretary and Advisor to the Dairy Cattle Sales Society. This office also served as a project leader for numerous initiatives of the Canada Nova Scotia Agri-Food Agreement.

Requests for information, material and/or advisory assistance continues to broaden in scope and range as agriculture attempts to diversify. Department personnel, industry trade associations, interdepartmental groups and committees on a provincial and interprovincial basis are seeking markets information to access funding from federal, provincial and municipal programs.

II. CLIENT SERVICES:

Specific market assessments and profiles were undertaken for industry and other agencies during the year. The range and scope of management information developed by this office would be sadly curtailed were it not for the support of Elinor Maher, Sharon McLean and Claire Hanlon (casual term). Over the review period the following activities or reports were undertaken:

- Ad track commodity features series was released quarterly with a 1990 annual.
- The fifth annual Live Swine Administrative Review was completed.
- Non traditional poultry and game market demand surveys were updated for retail and foodservice.
- Price and volume chart series on database were released quarterly with a 1990 annual to targeted personnel in industry and government.
- Assisted consumer questionnaire survey development regarding Armstrong Select beef.
- Dairy goat milk fluid and processed market assessments were completed with Elm Avenue Dairy and Dairy Services, Animal Industry Branch.
- Assessments of organic foods market potential on the range of products were undertaken for clients.
- Chicken supplies and pricing in the province were monitored for Canadian Chicken Marketing Agency. This involves regular contact with foodservice and retail accounts, plus compiling advertising and promotional activities involving chicken.

- A raw materials availability survey for a client contemplating the establishment of gourmet (export oriented) pet food facility was undertaken.
- Summary data on "horse trading", market channels and volumes in Atlantic Canada were identified.
- A survey of Atlantic Canadian race tracks was undertaken on behalf of a client interested in supplying a baled horse bedding from mill waste.
- The scope of Canadian fresh and frozen horse meat exports was ascertained and the Atlantic Canadian supply component identified.

III. MARKET EDUCATION AND EXTENSION:

This office co-operated with diverse personnel and agencies to assist in the dissemination of agrifood information. These included lectures on the N.S.A.C. campus, county meetings and radio tapes.

AUDIO VISUAL AND EXHIBIT MATERIALS - Developed for Branch and client use in 1990, slides, charts, graphs and tables in co-operation with other Branch members.

LIVESTOCK MARKET REPORT - Supervised the Branch - sponsored weekly radio livestock price information program which continues to be produced by Frank MacDonald, Truro. This program is released via Nova Scotia Government Services and carried as a public service on the majority of Nova Scotia radio stations (excluding C.B.C.).

IV. WORKTRIPS:

Strategies for Success IV, Toronto, October 1990 -

Participated with N.S.C.A., Beef Information Centre and Canadian Cattlemen's Assn. in a seminar on beef strategies for the 1990's.

71st Canadian Meat Council, Quebec City, February 1991 -

This conference is bracketed by pre-conference Society and Committee meetings relating to issues facing the meat sector. This office was able to participate in industry government meetings regarding beef grading and the Canadian Meat Science Association Symposium on the technological tools available for on line grading, robotized cutting of carcasses and meat quality evaluation.

Canadian Livestock Market Information Advisory Committee, Quebec City, February 1991 -

Provided a regional report to Committee members on provincial initiatives to improve markets and management information through the Marketing Services RBBS.

The completeness and comparability of price data generated and reported throughout Canada continues to be a central issue. This is in particular a concern in the wholesale boxed beef area as no headway has been made in the four years to implement a reporting system.

Fox Nova Scotia Project, Toronto, February 1991

Provided a presentation to Presidents of the provincial trappers associations concerning the initiatives to establish a consumer research and market development agency.

V. AD TRACK SERIES:

The Marketing Services Branch continues to monitor retail food store ads. Commencing with the second quarter of 1989 the summary was revised to track stores in Truro, versus Truro and Halifax. The concentration of store ownership and store closures resulted in dramatic changes in advertising strategies in Metro Halifax/Dartmouth and the ability to track non-print advertising and its content. The new series consists of tracking the type of print advertising, the total ad items, the total meat items and selected primary and secondary features for fresh pork, turkey and lamb. Stores included in the survey are Sobeys, Co-op, Cavanaghs, I.G.A. and Save Easy.

TABLE I – TOTAL AD ITEMS PER QUARTER

	2ND 1990	3RD 1990	4TH 1990	1ST 1991
SOBEYS	1923	1607	2041	2148
CO-OP	741	844	1071	971
CAVANAGHS	362	399	378	314
RYANS IGA	1128	1071	1543	1332
SAVE EASY	904	1126	1480	1061

TABLE II – TOTAL MEAT ITEMS PER QUARTER

	2ND 1990	3RD 1990	4TH 1990	1ST 1991
SOBEYS	285	223	259	279
CO-OP	129	151	174	142
CAVANAGHS	125	134	124	99
RYANS IGA	187	218	275	215
SAVE EASY	208	252	274	180

TABLE III – # OF FRESH PORK FEATURES

	2ND 1990	3RD 1990	4TH 1990	1ST 1991
SOBEYS	24	19	18	25
CO-OP	3	9	9	6
CAVANAGHS	6	4	8	13
RYANS IGA	12	12	20	15
SAVE EASY	2	4	10	7
TOTALS	**47**	**48**	**65**	**66**
Comparison 1989/90	-25%	-22%	+25%	No Change

TABLE IV – # OF CHICKEN FEATURES

	2ND 1990	3RD 1990	4TH 1990	1ST 1991
SOBEYS	34	21	28	32
CO-OP	4	5	7	13
CAVANAGHS	8	10	6	8
RYANS IGA	11	16	21	33
SAVE EASY	2	4	0	4
TOTALS	**59**	**56**	**62**	**90**
Comparison 1989/90	+18%	-12%	+22%	+84%

TABLE V – # OF TURKEY FEATURES

	2ND 1990	3RD 1990	4TH 1990	1ST 1991
SOBEYS	15	9	18	13
CO-OP	3	0	6	2
CAVANAGHS	2	0	4	1
RYANS IGA	4	6	12	11
SAVE EASY	2	0	7	5
TOTALS	**26**	**15**	**47**	**32**
Comparison 1989/90	+63%	-52%	-12%	+88%

TABLE VI – # OF LAMB FEATURES

	2ND 1990	3RD 1990	4TH 1990	1ST 1991
SOBEYS	8	7	8	16
CO-OP	1	1	10	3
CAVANAGHS	2	2	1	0
RYANS IGA	2	3	4	11
SAVE EASY	0	3	2	1
TOTALS	**13**	**16**	**25**	**31**
Comparison 1989/90	+86%	+60%	+277%	+240%

VI. DATA BASES/MARKET GRAPH SERIES:

During 1990/91 data bases were maintained for the following information and allowed for quarterly and annual reports tracking market information focusing on prices and volumes for hogs, sheep and cattle. This series is circulated to key Department and industry personnel.

1. Weekly Rail Grade A1/2 Steer bids, Calgary, Toronto & Truro
2. A1/2 Slaughter Steer Prices, Toronto & Truro
3. A1/2 Slaughter Heifer Prices, Toronto & Truro
4. Weekly Live Price 95 lbs. + lamb, Calgary, Toronto & Truro
5. Weekly Lamb Volume, Truro
6. Weekly Feeder Steer Prices, 700 +, Edmonton, Toronto & Truro
7. Weekly Feeder Steer Prices, 500 +, Edmonton, Toronto & Truro
8. Weekly Feeder Steer Prices, 400 +, Edmonton, Toronto & Truro
9. Weekly Wholesale Beef/Steer Carcass Prices A1/2, Montreal, Calgary and Atlantic
10. Cash Hog Prices, Index 100, Alberta, Ontario and Omaha
11. Weekly Choice Slaughter Steer Prices, Oklahoma & Toronto
12. Weekly D1/2 Slaughter Cow Prices, Edmonton, Toronto & Truro
13. Weekly D3 Slaughter Cow Prices, Edmonton, Toronto & Truro
14. Weekly Wholesale Dressed D1 prices, Montreal, Toronto & Atlantic
15. Veal Calves Volume Weekly numbers and prices, Truro

16. Atlantic Volumes Inspected Slaughter, N.S. origin, for cattle, calves, swine and lamb on a weekly basis
17. Weekly Canadian Processed Egg Production, volume of total liquid break, whole egg and sold as liquid
19. Cattle Volume, Maritime Cattle Market

VII. RBBS-PC:

The Remote Bulletin Board Service is in its third year and is meeting its goal of improving the timeliness of markets information to the agrifood community in Nova Scotia. The agrifood project has provided, at a greatly reduced cost, public access to the RBBS. Marketing Services continues to maintain that access and usage are critical to the establishment of the legitimacy of the RBBS as a price and volume source. It appears acceptance of the remote bulletin board service rests with broader demonstrations to the agrifood community and Extension staff. An expanded markets information project will undertake a series of demonstration labs throughout the province. By this method, professional and secretarial support staff will be trained in the use of the system and enable them to demonstrate it to farm clientele as they visit the regional offices in the normal course of their industry interface.

VIII. PROCESSOR-DISTRIBUTOR-RETAIL CONTACT:

Contact was maintained with a cross-section of general management, sales and production personnel at red and poultry meat processor and distributor level in Atlantic Canada.

With retail consolidation and centralized buying programs dominating the retail scene, this office maintains ongoing contact with the head office staff of Sobeys, Co-op Atlantic, Atlantic Wholesalers, Bolands I.G.A., and subsidiaries.

PERFORMANCE OF PLANTS OPERATING UNDER N.S. MEAT INSPECTION ACT:

Association member plants have recaptured or advanced in their percentage of total slaughter of livestock of Nova Scotia origin in 1990. As displayed in the accompanying graph 32% of all cattle, 88% of calves, 99.6% of sheep and lambs and 5.5% of hogs are slaughtered in I.M.P.A.N.S. plants.

LIVESTOCK AUCTIONS:

- Maritime Cattle Market
- Lawrencetown Federation Sale
- Sussex Studholm

The Maritime Cattle Market continues to perform a valuable service for the livestock industry. Although 90% of the red brand beef and all cows are purchased by private treaty, the clearing house function is essential for all classes. The two small provincial sale barns and the many specialized sales provide essential services for those producers who utilize them. Private treaty sales are on the increase. This has a negative impact on price discovery and full market reporting.

MARITIME CATTLE MARKET CATTLE & CALF VOLUME SUMMARY
NUMBER OF HEAD (BY TYPE)

YEAR	TOTAL OF CATTLE/CALVES	STEERS & HEIFERS	SLAUGHTER COWS	SLAUGHTER BULLS	SLAUGHTER VEAL	BOB CALVES	FEEDERS	DAIRY REPLACEMENTS
1984	21,839	1025	2972	264	1967	7628	5816	2167
1985	24,759	1231	3721	231	1982	8510	6688	2396
1986	28,790	1106	3510	246	2010	11373	7928	2617
1987	29,941	931	3777	203	2122	10640	9024	3244
1988	27,286	800	2825	277	2568	11199	7225	2392
1989	25,970	613	2099	185	2475	11717	6511	2370
1990	27,182	315	1840	157	2821	12208	7140	2701

IX. INTERGOVERNMENTAL LIAISON:

This office continues to interact on a request and enquiry basis with a series of federal and provincial agencies. This work includes consultant services to regulatory and funding agencies.

X. MAJESTIC FUR ASSOCIATION:

The Nova Scotia Fox Breeders successfully completed an AFDA cost-shared five year marketing strategy. The action plan has identified the total fur sector, ranch and harvested, would benefit from the creation of a marketing organization to undertake activities relating to organizational market development and market research initiatives. Nova Scotia Fox has entered into discussions with Canada Mink, Canada Fox and the Canadian Trappers Federation regarding the areas of common interest and benefit identified on the study.

There is a general consensus among the industry that a producer/trapper agency to initiate market research is the foundation for market development, both national and international. An organization chart with member players, roles and functions follows.

Although Nova Scotia is a minor player in total sale value of trapped fur, it has a large, broadly distributed trapper community. Nova Scotia fox and mink producers represent a major proportion of the Canadian ranched fur industry. Nova Scotia fox producers accounted for an average of 21.5% of the total Canadian fox pelts produced from 1986-89. Ranch mink producers accounted for 21% of Canadian mink pelts offered over the same period. The ranch fur sector is a significant contributor to total farm cash receipts in Nova Scotia. This has averaged 4% in recent years.

The inclusion of the wild fur sector in any market development initiative is critical and cost effective as they represent 40% of all auction fur in Canada. The following table provides an overview of Canadian fur sales in recent years.

ANALYSIS OF CANADIAN FUR SALES BASED ON % OF TOTAL VALUE

YEAR	RANCH MINK	RANCH FOX	TRAPPED, ALL SPECIES
1984	62%	8%	30%
1985	50	7	42
1986	49	10	41
1987	45	8	47
1988	56	8	35
	52%	8.2%	39%

XI. ARMSTRONG'S SELECT NOVA SCOTIA BEEF:

Marketing Services' consumers surveys have told the industry that between 85 and 95% of Nova Scotians would like to buy Nova Scotia beef providing it is of equal price and quality to (Western) beef they are now buying. They indicated they would like to be able to identify beef by origin in the meat case. The Western Annapolis Valley Cattlemen's Assn., Nova Scotia Cattlemen's Assn., and Marketing Services are co-operating with a "branded" beef program for Armstrong Select. This label is being tested with Bolands IGA outlets in Metro Halifax. This specification beef program has been spearheaded by O. H. Armstrong Ltd., Kingston, and is part of a multi-phased project. The first phase was the development of and testing of a branded label for the beef. The key phrase with the highest consumer appeal, projecting the image of quality desired by Armstrongs in the consumers' minds was Armstrong Select. In the past year O. H. Armstrong has been providing specification block ready vacuum packed beef that has been merchandised under identifying promotional material and labelled sub-primal cuts in the meat case. A concurrent program of in-store demonstration and consumer research has been ongoing. The in-store sampling program is striving to introduce Nova Scotia consumers to the tenderness and flavour attributes of properly prepared **leaner** beef cuts. Meat cut identification and recommended cooking procedures were distributed with the demos as well.

Interest and enthusiasm for the program continues to build at the consumer level. Trial and repurchase of Armstrong Select Beef are changing retailer perception about the quality of Nova Scotia beef. *The remaining challenge, which is not short term, is the increase in supply of specification Nova Scotia carcass beef and the adoption of production systems that allow the beef to be cost competitive with out-of-province suppliers.*

XII. NOVA SCOTIA HOG TRANSPORTATION POLICY:

Provincial shipments were up 5% but the county to county performance was uneven. The following summary profiles the producers benefits.

FREIGHT ASSISTANCE/HOG TRANSPORTATION ANALYSIS

MONTH	NUMBER OF PRODUCERS BENEFITED	AVERAGE BENEFIT PER FARM	AVERAGE BENEFIT PER HOG	TOTAL ANIMALS SHIPPED	TOTAL PAYOUT
APRIL '90	126	$86	$0.60	18,221	$10,852
MAY	122	99	0.63	19,051	12,062
JUNE	128	79	0.61	16,609	10,113
JULY	126	81	0.58	17,528	10,202
AUGUST	131	85	0.60	18,597	11,127
SEPTEMBER	126	76	.58	16,374	9,529
OCTOBER	119	107	.64	19,851	12,723
NOVEMBER	122	102	.66	18,668	12,434
DECEMBER	117	109	.69	18,470	12,786
JANUARY '91	118	119	.67	20,931	14,053
FEBRUARY	117	124	.88	16,447	14,594
MARCH	124	91	.67	16,959	11,310

XIII. AFDA MARKET DEVELOPMENT:

The demand on time to assist clients in completing applications and subsequent Project Supervision has resulted in additional strain on available time. The volume and range of inquiries continues to grow.

Fruits & Vegetables

Peter J. Rideout, P.Ag.
Marketing Specialist

The Kentville office of the Marketing Services Branch continues in its primary role of providing the marketing component of the Department's "team approach" to promoting the growth and development of the province's horticulture industry. With this approach, we work closely with Plant Industry, Extension Services and other Marketing Services staff on a day-to-day basis and ensure that a full range of marketing services are provided. Our activities are also increasingly "client oriented" within this team approach and involve on-going activities and specific projects with all levels of the horticulture industry, including: growers, packers, shippers, processors, carriers, brokers, wholesalers, retailers as well as provincial and national associations, marketing boards and other organizations. On a commodity basis, approximately 25% of work time is spent on each of the tree fruit, vegetable and blueberry sectors, with the remainder devoted to greenhouse crops, processed products, direct marketing, export devel-opment and administrative matters.

Within our area of responsibility in horticultural products, a significant amount of staff time is dedicated to professional advice and assistance to applicants under the current Canada/ Nova Agri-Food Development Agreement (AFDA).

We provide market analysis and situation reports to senior Department staff as required and maintain active contact with co-ordination with other staff in carrying out our duties. We maintain an extensive network of contacts with colleagues in other jurisdictions and in the food industry.

The provision of market analyses and advice to smaller and part-time producers, many of whom are producing "specific products", as well as to the media and the public, continues to be an important part of our program.

I. EXTENSION

Consultative marketing services with individuals, firms and organizations form the foundation of our marketing extension work with the province's horticulture industry. Activities range from responses to short-term demands for specific market opportunity or sales inquiries (i.e. "what is today's market for....?") to, more commonly, on-going involvement with marketing organizations, as well as individual growers and shippers.

We encourage and assist capable individuals and organizations to project their businesses onto regional, national and international markets, to the extent of their ability to service those markets and profit from them.

Eastcoast Apples Ltd. grew to include a third major grower/packer in 1990. *Blomidon Produce* (*Laurie* and *Jeff Hennigar*) joined *Gordon Lemmon* and *Paul & Peter Elderkin* in this marketing venture in its second year. The company has successfully serviced and expanded on the regional markets brought in by its partners and is testing the waters of export trade.

A new, state-of-the-art apple grader became operational at *Scotian Gold Co-operative Ltd.* in the fall of 1990. The system features electronic weight sizing and optical sorting controlled by

a micro-computer and has resulted in a marked improvement and greater consistency in the co-operative's pack.

Installation of a comparable system began in the fall of 1990 at *J.W. Mason & Sons Ltd.*, Windsor. The Mason grader has the added capability of *bulk bin re-filling,* enabling fruit to be sized and graded *before storage,* thus greatly improving storage efficiency through early diversion of off-grade fruit to juice processing.

These organizational and technical advances are somewhat overshadowed by a chronically fragmented local market where little co-operation for mutual benefit exists among the marketers of apples and pears. Prices stalled at marginal levels for most of the fall and winter 90/91 and showed surprising weakness when low price offers were heard on the market. Several issues of the *Tree Fruit Market Update* bulletin were published in the fall but weekly publication was suspended as market activity settled into a regular pattern with little or no price movement.

Public hearings on the proposed establishment of a *Canadian Apple Marketing Agency* were conducted by the National Farm Products Marketing Council across Canada in mid-summer. As in the cases of the two recent plebiscites on the establishment of a provincial marketing board for apples, the Nova Scotia industry is sharply polarized on this issue. The NFPMC report on the hearings and its recommendations regarding an Agency have yet to be made public.

Nova Scotia Gravenstein apples were successfully promoted in the Toronto area in 1990. While sales levels were modest in this first test marketing, the Nova Scotia Fruit Growers Association was very encouraged by the media attention generated by a well co-ordinated public relations effort. An expanded Gravenstein program is being planned for 1991.

Growers of some of the province's major vegetable crops experienced substantial crop loses in 1990 during a very difficult growing season. Early potato yields were down as much as 30% in poor stands resulting from a cold, wet spring followed by a hot, dry summer. Early broccoli and cabbage, the most profitable portion of those crops, suffered severely from wet spring conditions. Iceberg lettuce, still an expanding crop with greater potential, suffered substantial mid-summer losses due to heat, such that a substantial investment in a vacuum cooler is being undertaken by one grower for the 1991 season.

The difficult growing conditions notwithstanding, significant gains were made in the continuing diversification and expansion of the vegetable sector. Onion production increased in 1990 and Nova Scotia onions were very favourably received on the Atlantic Canada market in the fall and winter. Fall *carrot* production expanded as two new growers, *Jim Ansems* and *Peter Swetnam* came on stream, marketing through established channels. *Celery* production by *Nova-Agri Associates* found favourable results, and *Greg Coldwell's* spinach production program continued to increase market share.

The completion and opening of a new marketing facility at *Kings Produce Ltd.,* Pereau, Kings County, in 1990 marked another milestone for this successful new enterprise. The building provides receiving, cooling, shipping and office facilities to the companies' shareholders and other area growers. This office was actively involved as project leader during the planning phase of this project.

A record *28 million lbs.* of wild blueberries were harvested in Nova Scotia in 1990, a substantial part of the 131.5 million lbs. produced in the commercial wild blueberry area of eastern Canada and Maine. Producer prices were down from the previous year and some logistical problems

were encountered in processing the record quantity of fruit. Markets in North America and overseas remained fairly steady with good movement throughout the fall and winter. The *Wild Blueberry Association of North America* (WBANA) is active on many fronts including domestic and export promotion, research and development and communications and, has just completed an extensive strategic planning exercise. We continue to serve as WBANA's co-ordinator of Canadian domestic promotions, chairman of the Communications Committee, editor of the quarterly Bulletin and as an alternate member of the Overseas Marketing Committee.

WILD BLUEBERRY PRODUCTION - 1990 - 000's lbs.

Maine	72,400
Nova Scotia	28,000
Quebec	17,000
New Brunswick	9,400
Newfoundland	2,800
Prince Edward Island	1,900
TOTAL	**131,500**

Nova Scotia produced 3.8 million quarts of strawberries in 1990 on some 700 acres of fruiting crop. The crop was valued at $3.49 million at the farm gate, $.919/qt. Sales at pick-your-own farms accounted for 40% of the crop, with the wholesale trade absorbing about 47%. Market activity was very volatile in 1990 after several seasons of relative stability in strawberry marketing. Sudden increases in offerings led to severe discounting by some marketers in efforts to move a backlog of fruit in early July.

The Strawberry Growers Association of Nova Scotia has initiated a long term market development program in which we have been active. As part of this program in 1991, an extensive data collection of daily market activity will be carried out and a pilot project to ship pre-cooled, branded fruit to the New England market is in the final planning stages.

Raspberry production was reduced by dry summer weather but interest in this crop continues to grow. Some successful marketing with the supermarket trade has been noted particularly where careful post-harvest handling is practiced. The majority of sales continue to be at pick-your-own farms.

II. MARKET INFORMATION

The Department's *Fresh Produce Supply Forecast* is compiled and published by the Kentville office during the local produce season. The bulletin is distributed to a mailing list of some 200 produce industry firms and individuals, news media and other interested persons.

The *Market Line* daily produce market information service continues to operate seasonably from the Kentville office. In lieu of a summer assistant to update this information in 1990, the daily recording was revised remotely by *Claire Hanlon*, market research assistant in the Truro office. We continued to provide market analysis and interpretation as usual.

As mentioned, several issues of the *Tree Fruit Market Update* were published in late summer and fall as apple and pear markets were changing almost daily. Publication was suspended in late fall as markets settled to a very steady pattern and will commence again in late summer 1991 with early season market analysis and outlook.

III. STAFF DEVELOPMENT

As of January 1991 we have adopted the *Priority Management* "Time Text" management system, attending two seminars and a personal follow-up session with staff of Uren & Associates, Halifax. We are now fully active on the system and have made modifications to integrate our office files with it. A substantial increase in productivity has been noted.

IV. ORGANIZATIONS

We maintain a close, on-going, working relationship with producer and trade associations, marketing boards and other organizations as the most effective means of carrying out our market development role with the horticulture industry. Our activities in this line include service on standing and ad hoc committees, attendance and advice to boards of directors and conducting specific marketing-related projects and activities as required.

The groups with which we work, some of whom are mentioned previously, include:

Canadian Horticultural Council
Canadian Produce Marketing Association
Nova Scotia Fruit Growers Association
Vegetable & Potato Producers Association of Nova Scotia
Blueberry Producers Association of Nova Scotia
Wild Blueberry Association of North America
Strawberry Growers Association of Nova Scotia
Farm Fresh Marketing Association of Nova Scotia
Greenhouse Growers Association of Nova Scotia
Atlantic Fresh Produce Association
Highbush Blueberry Growers Association of Nova Scotia
Nova Scotia Potato Marketing Board
Nova Scotia Greenhouse Vegetable Marketing Board
Nova Scotia Processing Pea & Bean Growers Marketing Board

Foodservice

Linda D. MacDonald, M.Sc., P.Dt.
Marketing Specialist

I. INTRODUCTION

The report to follow outlines the major initiatives and program activities in the area of foodservice marketing from April 1, 1990 to March 31, 1991.

The primary objective of programming is to increase the awareness and consumption of Nova Scotia food products within the foodservice sector. General responsibilities include:

1. Monitoring and assessment of the Nova Scotia foodservice market through:
   - consumption trends and sales patterns.
   - evaluation of purchasing behaviours.
   - awareness and consumption of Nova Scotia agri-food products.
   - documentation of market problems and constraints with respect to foodservice.
2. Increasing awareness and enhancing the image of Nova Scotia agri-food products within the Nova Scotia foodservice market.
3. Promotion of Nova Scotia agri-food products with significant market potential in foodservice.
4. Development and marketing of specific Nova Scotia agri-food products (branded/generic) with market replacement and expansion potential within the foodservice industry.

Program activities most closely aligned with the foregoing responsibilities are:

(a) Education of foodservice operators, processors, distributors and producers (commodity groups/association marketing boards);

(b) Marketing agri-food products through programs of advertising, promotion, public relations and market development within the foodservice sector;

(c) Assisting Nova Scotia agri-food producers/processors by providing marketing services with respect to foodservice.

II. NOVA SCOTIA'S FOODSERVICE INDUSTRY

Canadian studies show that anywhere from 33 to 39 percent of the food dollar is now spent in foodservice establishments. This away-from-home food market has experienced tremendous growth (40%) over the past five years.

Nova Scotians eat out somewhat less than other Canadians; we are at 86 percent of the Canadian average. Nova Scotians will spend almost 450 million dollars in restaurants in 1990.

Food purchases by the foodservice industry in this province are currently estimated to be approximately 235 million dollars annually. Commercial establishments comprise the bulk of these purchases (75%) with institutional foodservice taking the remaining (25%).

Food costs, as a percent of total operating expenses, generally run operators anywhere from 10 to 45 percent - depending on the size, type and efficiency or the operation. Most of these food purchases are made through middlemen (wholesalers/brokers), although in many rural areas, small operators can make up to two thirds of their purchases at retail locations nearby.

III. REPORT OF PROGRAM ACTIVITIES

A. Liaison

1. Contacts

Initiating and maintaining contact with individuals and groups in the agriculture, food and foodservice industries of this province is key to program development efforts targeted to the foodservice sector.

In order to gain knowledge and technical expertise relating to the products and capabilities of Nova Scotia's food and agricultural industry, the following contacts were maintained over the past year: producer associations, organizations and boards; meat and poultry processors/wholesalers; fruit and vegetable processors/wholesalers; dairies; other producers and packers of Nova Scotia food commodities.

Ongoing contact with foodservice establishments in the province is important so that purchasing practices and policies, food product specifications, as well as preparation and packaging requirements can continue to be monitored. A working knowledge of the foodservice market was obtained through meeting and consulting with representatives of the foodservice industry as well as government departments, agencies, organizations and associations affiliated with this industry.

Among those contacted in 1990-91 were: Agriculture Canada; Nova Scotia Departments of Health and Fitness, Tourism and Culture, and Fisheries; Nova Scotia Restaurant and Foodservices Association; Nova Scotia Chefs Association; Canadian Food Service

Executives Association (Halifax/Dartmouth Branch) (Northumberland Branch); Nova Scotia Dietetic Association; Nova Scotia Purchasing Agency; Tourism Industry Association of Nova Scotia; Tourism and Hospitality Institute of Nova Scotia; individual foodservice managers of restaurants, hospitals, homes for special care and other institutional foodservice operations.

2. Presentations

During 1990-91 a number of seminars, workshops and meetings were attended where presentations were given. Included were:

- Nova Scotia Chefs Association (Halifax Sheraton, May 4, 1990);
- "Taste of Nova Scotia" Annual General Meeting (Halifax Sheraton, May 1990);
- Nova Scotia Dietetic Association, Northern Region Workshop (New Glasgow, May 24, 1990);
- NSAC Seminar Series (Truro, June 8, 1990); industry seminar "Final Report - Nova Scotia Foodservice Industry Analysis, 1990" (WTCC, June 29, 1990);
- Farmers' Markets Conference "Consumer Trends for the '90's" (NSAC, November 15, 1990);

- Nova Scotia Restaurant and Foodservice Association Annual Meeting (Halifax, November 17, 1990);
- Strawberry Growers Association of Nova Scotia Annual Meeting (Coldbrook, January 26, 1991); and
- Canadian Food Service Executives Association (Riverton RVC, Stellarton, January 29, 1991).

3. Professional Liaison

- Member, McBain Committee, Canadian Heart and Stroke Foundation
- Corresponding Member, Nova Scotia Nutrition Council
- Member, Nutrition Committee, Canadian Dietetic Association
- Member, Board of Directors, Milk Nova Scotia
- Member, Co-ordinating Committee, Nova Scotia Heart Health Program
- Member, Public Education Committee, Nova Scotia Heart Health Program
- Member, Board of Directors, Taste of Nova Scotia Society
- Member, Nova Scotia "Heart Smart" Restaurant Program Committee
- Member, Federal/Provincial Market Development Committee, AFDA

B. Promotion and Education

1. Publications and Other Resources

In 1990-91 Marketing Services published a number of resources to complement promotion and market development activities with respect to foodservice. In many cases these materials were a collaborative effort (i.e. graphic design, photography, recipe development/testing). The work and input by A/V Services, contract Home Economists and commodity promotion specialists is gratefully acknowledged.

"Food For Thought - A Buyers' Guide to Nova Scotia Food Products", 3rd edition, 1991. This popular resource contains a comprehensive listing of Nova Scotia food producers and processors together with contact, source of supply and product specification information.

"Lambtastic - Discover Nova Scotia Lamb". The first foodservice recipe book highlighting the versatility of Nova Scotia lamb, source of supply, handling and storage information.

"Nova Scotia Apples and Pears - A Part of Our Food Heritage". The first foodservice recipe book for apples and pears which includes recipes, source of supply, storage and handling information.

"Taste of Nova Scotia" Dining Guide, 1991

"Taste of Nova Scotia" consumer brochure

Fresh Supply Forecast Newsletter (May-October 1990)

"Taste of Nova Scotia" foodservice binder

"Meat Me For Lunch" recipe card series

"Nova Scotia Vegetables" recipe card series

The production of support materials to complement 1990-91 foodservice promotion programs included tent cards, menu clip-ons, buttons, recipe flyers/cards, information flyers/newsletters, and order forms for material. Commodities represented included red meat (beef, pork, lamb), strawberries, wild blueberries, apples and eggs.

2. Foodservice Promotions

- Taste of Nova Scotia Food Night (Halifax Hilton, November 18, 1990)
- Nova Scotia Strawberries (June-July 1990)
- "Out of the Blue" - fresh wild blueberry promotion (August 1990)
- Nova Scotia "Veggie" Cook-off (WTCC/Keddy's Truro, September 15, 1990)
- Nova Scotia Wild Blueberry Apprentice Chefs Culinary Competition (planning January-February 1991)
- Nova Scotia Festival of Foods (Glengarry Hotel, Truro, January - February 1991)
- "Meat Me For Lunch" foodservice promotion (February 1991)
- "Meat Me For Lunch" Trade Reception and Meat Expo (February 13, 1991)
- Project reports for the foregoing are available upon request.

3. Trade Shows/Displays/Exhibits

- Harvest Food Fest (September 1990)
  In co-operation with Keddy's Truro Inn, Marketing Services planned and implemented a major food show in September 1990. The initiative was a huge success again this year. Responsibilities included assistance with overall co-ordination, Nova Scotia Department of Agriculture and Marketing displays, consumer testing component, "Taste of Nova Scotia" Associate Member exhibits area, and N.S. Veggie Cook-off awards presentation.
- Nova Scotia Department of Agriculture and Marketing/NSAC Open House (September 1990)
  Co-ordination and set-up of Marketing Services display at Open House.
- ApEx Food and Beverage Show (Halifax, November 18-19, 1991)
  This is a new foodservice trade show to the Atlantic area. Six agri-food commodities promoted their products in the new "Taste of Nova Scotia" booth. "Taste of Nova Scotia" menu items were used to showcase our local products.
- Canadian Food and Beverage Show (Toronto, February 17-20, 1991)
  Marketing Services co-ordinated the Wild Blueberry Association of North America effort at the largest Canadian food show.
- ApEx Restaurant Show (Exhibition Park, Halifax, March 2-6, 1991)
  Once again the "Taste of Nova Scotia" concept was used to highlight and promote Nova Scotia food products. Six agri-food commodities were represented (greenhouse, honey, maple, lamb, beef and apples).

C. Market Development

1. Taste of Nova Scotia

In late May 1988, the government of Nova Scotia approved the establishment of the "Taste of Nova Scotia" program. The program proposes to position the province as a food destination by targeting the 1.5 million people who travel the province seeking a "Taste of Nova Scotia" - that is, our indigenous food products, wholesomely prepared and imaginatively presented.

Summer 1990 was the second membership year for the program. Although the focus was to continue to promote member foodservice establishments which met specific service, hospitality and menu guidelines, it was a year of change.

The program moved toward greater self-sufficiency through incorporation under the Societies Act. Responsibility for program management is now ensured through a Board of Directors comprised of industry and government representatives.

The associate members and sponsors commitment was also increased.

These member food companies support the program with both financial commitments and marketing expertise.

The 47 foodservice "Taste of Nova Scotia" members were key to the successful implementation of the program's second year of operation. They received marketing assistance through consultation, menu development activities, newsletters, guidebook, point-of-sale materials, source of supply information, government marketing and promotional activities. In return, members adhered to a rigorous set of standards and a commitment to use local products.

The work of the Taste of Nova Scotia Board was undertaken by way of committees - Finance, Marketing, Member Services, Membership, and Long Range Planning. Nova Scotia Department of Agriculture and Marketing played a leadership role in guiding the program and its resultant initiatives through this year's operation. As well, the Branch provided much needed consultation in accessing suppliers of product, menu development and liaison with trade and commodity boards/associations.

The "Taste of Nova Scotia" program continues to be a comprehensive multi-disciplinary approach to marketing our local food products. It is industry-driven with a large measure of involvement and support from the private sector.

"Taste of Nova Scotia" continues to support the awareness and consumption of Nova Scotia food products. Throughout 1990-91 Nova Scotia Department of Agriculture and Marketing and "Taste of Nova Scotia" have collaborated on many joint promotion and marketing initiatives. An annual report outlining agri-food marketing and promotional activities is available upon request.

2. AFDA

Member of the AFDA Market Development Implementation Committee and project leader and/or assistance given to applicants in 1990-91 including: Elm Avenue Dairy, Milk Nova Scotia, Pork Nova Scotia, Williamsdale Winery, "Taste of Nova Scotia", and Nova Scotia Department of Agriculture and Marketing.

3. Foodservice Study

As the foodservice program has evolved, it has become apparent that more market oriented

information was needed - specifically, information focusing on the critical determinants of buyer behaviour in both the middlemen (wholesaler/broker) and end-user (foodservice) sectors. These data are necessary to the development of marketing strategies to assist the Nova Scotia Department of Agriculture and Marketing in addressing foodservice needs and demands.

Early in 1989, with assistance under the Agri-Food Development Agreement (AFDA), Peat Marwick Stevenson & Kellogg was contracted to undertake a market analysis of the Nova Scotia foodservice industry. This report, entitled "A Market Analysis of the Nova Scotia Foodservice Industry - 1990", was completed in May 1990. It reviews the literature and assesses the baseline situation, explores the attitudes and perceptions of distributors and foodservice end-users towards Nova Scotia food products (focus groups) and with results from a survey questionnaire gathers data pertaining to food purchase behaviour and opportunities for local producers and processors. Copies of the report were distributed to industry representatives and a formal presentation of results was organized in June 1990.

4. St. Pierre and Miquelon Trade Mission

Requested by the Department of Industry, Trade and Technology, Marketing Services participated in the St. Pierre trade mission in March 1991. The purpose was to investigate problems with supply of Nova Scotia products and services, as well as to explore export opportunities for Nova Scotia agri-food firms. A report on the mission is available upon request.

5. Taste of Scotland

Marketing Services participated in a joint venture with "Taste of Nova Scotia" and Nova Scotia Department of Tourism and Culture to investigate the "Taste of Scotland" program based in Glasgow, Scotland in September 1990. A report outlining findings and the Scottish experience with respect to the agri-food component of Scotland's foodservice program is available upon request.

6. Agricultural Quality Identification Program (AQIP)

In 1990 Marketing Services decided to investigate the merits of instituting a quality identification program for Nova Scotia food products. A proposal for the program and program description has been completed. Several studies are currently underway to investigate consumer and trade acceptance as well as the possible use of the "Taste of Nova Scotia" logo for quality Nova Scotia food products.

D. Continuing Education

The following conferences, trade shows and seminars were attended in 1990-91:

- TUNS Continuing Education. Sensory Evaluation and Consumer Testing (Halifax, April 26 and 27, 1990)
- Hostex (Toronto, May 22 and 23, 1990)
- Canadian Dietetic Association Conference. "Issues and Challenges - The Canadian Food Supply" (June 3-6, 1990)
- Social Marketing Workshop (Halifax, September 7, 1990)
- Consensus Building Workshop (Halifax Citadel, Halifax, January 15-16, 1991)

E. Administration

- Work plan, reporting, budget submissions.
- Calls and correspondence related to program.
- Special reports/consultations as requested.
- Co-ordination of contract casual employees.
- Special projects as required including "Agricultural Quality Identification Program".

IV CONCLUSION

The work and assistance of many individuals who contributed to the success of programming is greatly appreciated - most notably, Mary Paquet, Micheline Gibson, Dawn MacKay, Phyllis Cipolla and Heather MacKenzie. As well, the input and support of my Director and colleagues is gratefully acknowledged.

It is hoped that, through the efforts outlined in this report, a significant impact on the agricultural industry of this province has been realized.

Promotion

K. Laurie Sandeson, B.Sc., M.Sc.
Marketing Specialist

CONTENTS OF THIS REPORT:

Report Highlights
- Section I. - Market Development Programs (Provincial)
  - A. Marketing Assistance Program
  - B. Consumer Shows
  - C. Commodity Promotion
- Section II. - Export Trade Missions
- Section III. - Committee Involvement
- Section IV. - Workshops/Trade Shows/Conferences
- Section V. - Audio-Visual
- Section VI. - Advertising
- Section VII. - Speeches and Presentations
- Section VIII. - Consultations

REPORT HIGHLIGHTS:

- 30 MAP applications approved totalling $104,220.32
- Nova Scotia Department of Agriculture and Marketing participation in five provincial consumer shows
- Assisted in the development of three new commodity consumer brochures including rabbit, chicken and maple.
- Assisted in the development of three new Agricultural Awareness hand-outs (i.e. fact sheets, general agri-food industry brochure and county brochures).
- Developed a new Nova Scotia Department of Agriculture and Marketing greeting card and worked with Government Services in creating a multi-promotional kit folder.
- A member of eight committees including - Nova Scotia Agricultural Awareness; Field Crops Expo '90; Annapolis Royal Historic Gardens Society; Farmers' Markets Association of Nova Scotia; NSAC Open House; Atlantic Fresh Produce Association; Maritime Farmers' Council; and Silvilog '90.
- Delivered five speeches and prepared a slide presentation on behalf of the Strawberry Growers Association of Nova Scotia. Speeches were given at the Blueberry Producers Association and Maple Producers Association of Nova Scotia annual meetings, Atlantic Poultry short course, Women in Business conference, and Canadian Agricultural Extension Council meetings.

- Participated in six workshops and/or displays including:
  - media workshop,
  - radio workshop,
  - Nova Scotia Department of Agriculture and Marketing exhibit at "Innovations in the Food Processing Industry" conference,
  - advertising seminar,
  - Career Track seminar, and
  - Business Awareness and Enhancement Program.
- Participated in four trade missions:
  - NEBS (New Exporters to Border States),
  - CPMA conference (Canadian Produce Marketing Association),
  - foreign attache tour of Nova Scotia, and
  - Newfoundland Food and Livestock Show.
- Office consultations with several Nova Scotia agri-food entrepreneurs and commodity groups.
- Attended three conferences/trade shows as an exhibitor and/or delegate.
- Placed 32 advertisements on behalf of the Nova Scotia Department of Agriculture and Marketing in Nova Scotia exhibition and fair program books, magazines, newspapers, and other publications.
- Conducted 89 radio interviews and 5 monologues.

I. MARKET DEVELOPMENT PROGRAMS (Provincial)

A. Marketing Assistance Program

There were 30 applications approved totaling $104,220.32 . In all cases, the level of assistance provided was at least 50 per cent of total eligible project costs.

A summary of projects is listed below.

Pork Nova Scotia	purchase of a BBQ - June	$ 3,000.00
	Trivia Wheel invoice - Nov.	1,512.50
	Nutrition Month Tie-in - Feb.	2,100.00
	BBQ kit & Foodservice Promo - Apr.	3,000.00
Strawberry Growers	p.o.s. material, retail/wholesale visits, media work, etc. - June	10,000.00
Farm Fresh Marketing Assn.	p.o.s. material, Harvest Line - July	4,635.75
Blueberry Producers Assn.	support for the fresh wild blueberry promotion in Hfx - Aug.	2,479.00
N.S. Greenhouse Vegetable Marketing Board	in-store demo campaign - July	4,500.00
N.S. Cattlemen's Assn.	Heart Healthy Fair - July	700.00
	consumer & trade show participation - Sept.	4,612.00

Farmers' Markets Assn.	p.o.s. material - Aug.	5,853.75
	Direct Marketing Conference, New Jersey - Feb.	600.00
Vegetable Producers Assn.	vegetable cooking school - Aug.	750.00
	participation in Harvest Food Fest - Sept.	300.00
Commercial Meat Rabbit Producers Association	new consumer brochure - Aug.	2,463.00
N.S. Chicken Marketing Board	new retail sticker - Sept.	6,500.00
N.S. Egg Board	product of the month radio campaign - Aug.	2,950.00
	Nutrition Month campaign - Feb.	2,884.00
N.S. Fruit Growers Assn.	apple pear foodservice booklet	5,081.40
Potato Marketing Board	co-operative promotion with Farmers Dairy - potatoes & new light sour cream	4,845.00
Scotia Swine Breeders	display set up at Maritime pork conference	500.00
Atlantic Fresh Produce Assn.	fresh produce promotions at retail - Sept.	1,000.00
N.S. Fox Breeders Assn.	to help establish a national fur marketing agency	4,000.00
Western Annapolis Valley Cattlemen's Assn.	to support a branded beef program - Feb.	10,000.00
Inspected Meat Plants	to create a modular display used to promote the Assn. and its members and products to foodservice and retail trade-Feb.	700.00
Maple Producers Assn.	maple festival brochures, advertising posters and other p.o.s. materials-Jan.	4,820.00
N.S. Federation of Agriculture	greeting card invoice-Dec.	733.92
Wild Blueberry Assn. of North America	normal operating-Dec.	10,000.00
Horse Industry Assn. of Nova Scotia	support for the Atlantic horse exhibition in Windsor	2,700.00
Halifax City Market	support for the marketing study completed by Deloitte & Touche	1,000.00
TOTAL		**$ 104,220.32**

B. Consumer Shows

Garden and Patio Show 1990

Marketing Services, along with Plant Industry, co-ordinated a large exhibit at the second annual consumer garden and leisure show at the Halifax Metro Centre. In addition to acting as sole sponsor, the Nova Scotia Department of Agriculture and Marketing offered publications on various aspects of horticulture and staff were on hand to answer questions. An agricultural awareness video theatre was set up in one corner of the booth.

Attendance estimate 6,000.

Seniors' Expo 1990

This show was a first in the Atlantic region. The Nova Scotia Department of Agriculture and

Marketing co-ordinated an agri-food display on behalf of several commodity groups. There was much interest shown in Nova Scotia agri-food products, and recipes were distributed which catered to single dwellers or two household families.

Attendance estimate 10,000.

Harvest Food Fest '90

For the second year in a row, the Marketing Services Branch sponsored and co-ordinated this showcase of Nova Scotia agri-food products at Keddy's in Truro.

Fourteen agricultural commodity boards and associations participated and an additional fifteen booths were occupied by processors, retailers and wholesalers.

This year the show added a Nova Scotia farm winery display with participation from Jost Vineyards, Grand Pre Wines Ltd., Williamsdale Winery and Saint Famille Wines Ltd.

The Extension Branch staff co-ordinated an agricultural awareness activity room with a trivia game, vegetable guessing contest, etc.

Attendance estimate 6,000.

Atlantic Winter Fair

This year the Department exhibit had an agricultural awareness theme. A new agri-food Trivia Wheel drew much interest from visitors. The agricultural awareness program for school children featured a commodity display in the main arena, a dairy display and puppet show.

Attendance estimate 84,000.

Swing Into Spring '90

The Department exhibit featured apple cider-making demonstrations, food sampling and a static display of Nova Scotia fresh produce, meats, dairy, honey and maple syrup.

Attendance estimate 4,000.

C. Commodity Promotion

New consumer brochures were developed and printed on domestic rabbit, chicken and maple syrup.

Assisted in a fresh wild blueberry promotion with Bolands IGA stores (in-store display contest, distribution of p.o.s. material, advertising, etc.).

Co-ordinated promotional activities on behalf of Maple Producers Association of Nova Scotia (development and printing of festival supper brochures, posters, placemats, advertisements in five provincial newspapers, news releases to media, and maple magic foodservice promotion).

Assisted in organization of Nova Scotia potato promotion in co-operation with Farmers Dairy.
Convened commodity specialist meetings to discuss upcoming plans and co-operative efforts.
Consultation with goat association in planning marketing strategies.
Consultation with Scotia Swine Breeders in development of new p.o.s. material.
Consultation with Greenhouse Vegetable Marketing Board in designing an ad campaign.

II. EXPORT TRADE MISSIONS

A. New Exporters to Border States Program

Together with the Livestock Marketing Specialist we participated in a NEBS program in October 1990. This particular NEBS was set up for government employees who would, in turn, be able to offer assistance to their clients in demystifying the export business. A further NEBS mission consisting of nine agri-food industry representatives, including the Branch Director, attended the Boston Solo Food Show in February.

B. Canadian Produce Marketing Association

This convention/trade show was held in Calgary, Alberta, and once again Nova Scotia Department of Agriculture and Marketing had an exhibit. The booth was staffed by ourself and representatives from Scotian Gold and Kings Produce. According to the General Manager of Scotian Gold, some very good contacts were made for sale of apples. A California produce wholesaler won our free draw for an apple blossom portrait.

Attendance estimate 500.

C. Newfoundland Food and Livestock Show

This year we briefed the Marketing Specialist in Cape Breton, Brendan MacDonald, on the Newfoundland show and suggested we feature only Nova Scotia apples.

The Nova Scotia Fruit Growers Association of Nova Scotia also participated in the third annual consumer agri-food show in St. John's, Newfoundland.

Attendance estimate 26,000.

D. Foreign Attache Tour

We put together promotional kits for members of the foreign attache group who travelled around the Maritimes in June 1990. These Canadian embassy representatives were anxious to learn more about agriculture in Nova Scotia.

E. Interdepartmental Folder

In co-operation with the Trade Development Authority a multi-use, interdepartmental folder was designed for use in promoting the province.

III. COMMITTEE INVOLVEMENT

Nova Scotia Agricultural Awareness
Conducted interviews for position of co-ordinator; helped develop new agri-food industry fact sheets, general information brochure and county pamphlets; and helped co-ordinate Atlantic Winter Fair children's program.

Field Crops Expo '90
Member of Publicity Committee.

Annapolis Royal Historic Gardens Society
Government advisor and member of the 10th anniversary celebrations sub-committee.

Farmers' Markets Association of Nova Scotia
Member of the Promotion Committee; and helped plan a fall workshop and prepare new public relations material.

Atlantic Fresh Produce Association
Government advisor to the retail sub-committee which is responsible for promotion of Atlantic grown fresh produce.

NSAC Open House
Member of the steering committee.

Maritime Farmers Council
Member of the Promotions Committee representing the Nova Scotia Institute of Agrologists.

Silvilog '90
Helped co-ordinate a Nova Scotia wild blueberry exhibit and assisted the maple producers in their efforts to highlight the maple industry in Nova Scotia.

IV. WORKSHOPS/TRADE SHOWS/CONFERENCES

Media Workshop
Together with the Foodservice Marketing Specialist we organized a one-day media workshop for commodity promotion specialists and others interested in working with the media.

Radio Workshop
We conducted a workshop for new 4-H summer students regarding script writing, delivery and other do's and don'ts in preparing and reading radio scripts.

Advertising Seminar
We attended a half-day seminar in Halifax on cost-effective advertising and power communication words.

Career Track Seminar
We attended the seminar called "Power Communication Skills for Women".

Business Awareness and Enhancement Program
We represented the Department during this one-day trade show which explored opportunities for business in Nova Scotia's South Shore region.
The Department exhibit featured government programs including AFDA, ALFI and the Marketing Assistance Program.

Innovations in the Food Processing Industry
This trade show/conference featured numerous value-added products being tested or marketed in the province. The Nova Scotia Department of Agriculture and Marketing display was staffed by the Horticulture and Promotion Marketing Specialists.

Direct Marketing Challenges '90
We attended the Sunday night session and acted as chairperson of the session on Advertising and Promotion conducted by Orville Pulsifer.

National Direct Marketing Conference
We attended this national event along with Jackie Allen, Secretary-Manager of the Farmers' Markets Association of Nova Scotia. The trade show portion featured a variety of value-added

products (e.g. honey and maple flavoured preserves, conserves, and drinks, along with pies, chocolates, dried fruits and apples).

The post-conference tour took us to four direct markets. Almost all markets offered fresh baked goods, maple syrup and honey products, and a variety of fresh produce.

V. AUDIO-VISUAL

We conducted 89 interviews and 5 monologues on the Department's radio program "Nova Scotia's Agriculture and Marketing Update".

Work continues on a new "Agriculture in Kings County" video.

Radio Program Summary

Number of radio stations that receive tapes - 9
Total listening audience potential - 300,000-400,000

Date	Title	Interviewee
April 3/90	Positive Attitude and Awareness Toward Safety	George MacKenzie
April 10/90	N.S. Beef Industry Upcoming Events	Fraser Nicholson
April 17/90	Top Events for Holstein Breeders	Phil Stead
April 17/90	Wrap-Up of the Red Meat Campaign in N.S.	Linda MacDonald
April 24/90	Bedding Plants Recommendations	Bev MacPhail
April 24/90	Inspected Meat Plants Assn. of N.S.	Ray Foote
May 1/90	Strawberry Industry Update	Bob Murray
May 1/90	Good Quality Hay Required for Export	John Murray
May 8/90	Grape Industry Update	Bob Murray
May 15/90	Canada/N.S. Soil Conservation Agreement	Mike Langman
May 15/90	Women's Institute New Programs for the '90's	Kathy Hagan
May 22/90	Maritime Greenhouse Vegetable Industry in Crisis	Peter Stokdijk
May 29/90	Canadian Dietary Changes & Beef Consumption	Mary Elizabeth Stewart
May 29/90	Armstrong Select Nova Scotia Maritime Beef	Heather MacKenzie
June 5/90	Liming the Soil	Charles Thompson
June 5/90	Problems with Fruit Trees Not Bearing Fruits	Myrna Blenkhorn
June 12/90	Outlook for Fruit & Vegetable Crops for this Year	Peter Rideout
June 12/90	4-H Canadian Council Annual Meetings and Workshops	Liz Crouse
June 19/90	Tips on Growing Apple Trees for the Home Gardeners	Bill Craig
June 19/90	Leftover Frozen Strawberries	Bela Casson
June 26/90	Field Crops Expo '90 - Update	Jack Van Roestel
July 3/90	"Taste of Nova Scotia" Program	Linda MacDonald
July 3/90	N.S. Greenhouse Growers - New Techniques	Bev MacPhail
July 10/90	Operation Spray Check	Lise LeBlanc

July 10/90	New Weed Varieties in Nova Scotia	John Thompson
July 17/90	"Nova Scotia Festival of Foods" Video	Sheila Ferguson
July 17/90	"Taste of Nova Scotia" Consumer Program	Sarah Shephard, Caroline Wolfe
July 24/90	Farm Safety Week - July 25 to 31	George MacKenzie
July 24/90	Farmers' Markets Throughout the Province	Jane Brewster
July 31/90	Composting	Myrna Blenkhorn
July 31/90	"Take Along the Taste"	Karen Cole
Aug. 7/90	Pork Nova Scotia	Marianne MacDonald
Aug. 7/90	N.S. Gravenstein Apples to Hit the Toronto Area	Janice Lutz
Aug. 14/90	Meat Safety	Mary Elizabeth Stewart
Aug. 14/90	Foodservice Industry Study in N.S.	Linda MacDonald
Aug. 21/90	Silvilog '90	Don Cameron
Aug. 28/90	Harvest Food Fest '90	Heather MacKenzie
Aug. 28/90	Promotion of Agri-Food Products	Caroline Wolfe
Sept. 4/90	Agriculture Awareness at the Atlantic Winter Fair	Susan Horne
Sept. 4/90	1990 Livestock International Show & Sales, Moncton	Don Butler
Sept. 4/90	Dairy Symposium	Don Butler
Sept. 11/90	"Country Farm Jamboree" Puppet Show	Jane Lewis
Sept. 11/90	"The Meeting Place for Tomorrow's Tehnology Today" The Theme for the 1990 Livestock International Show & Sale	Don Butler
Sept. 18/90	Velvet Leaf - New Weed to Nova Scotia	John Thompson
Sept. 18/90	Provincial 4-H Show in Truro	Bill MacLeod
Sept. 25/90	1990 Strawberry Season Update	Bob Murray
Sept. 25/90	Nova Scotia Farm Women's Conference	Linda Grant
Oct. 1/90	Atlantic Winter Fair Update	Laurie Thompson
Oct. 1/90	Grape and Farm Wine Industries Update	Bob Murray
Oct. 9/90	Nova Scotia Blueberry Industry Update	Jack Sibley
Oct. 9/90	Soils Investigations at the Debert Paleo-Indian Site	Dr. Gordon Brewster
Oct. 16/90	Maritime Pork Conference - Nov. 15-16	Bruce Bishop
Oct. 23/90	Crafts 'n Creations Workshop - Nov. 17-18	Gail Keddy
Oct. 30/90	Agriculture Awareness Program	Susan Horne
Oct. 30/90	Farmers' Markets	Jacqueline Allen
Nov. 6/90	G.I.S. and L.E.A.P.S.	Mike Langman
Nov. 6/90	Agri-Biology Program	Dr. Randy Olsen
Nov. 13/90	Cesium-137 - What Is It?	Dr. Gordon Brewster
Nov. 13/90	Chicken and Its Versatility	Dawn Dockerill
Nov. 20/90	What is the Nova Scotia Crop Development Institute?	John Lewis
Nov. 20/90	Turkey Parts	Bela Casson

Nov. 27/90	Atlantic ApEx Food & Beverage Show	Linda MacDonald
Nov. 27/90	Agriculture and the Environment Sumposium	Derrick Jamison
Dec. 4/90	O. H. Armstrong Select N.S. Beef Project	Heather MacKenzie
Dec. 4/90	Enrollment at the N.S.A.C.	Vic Saxon
Dec. 11/90	"Taste of Nova Scotia" Program	Linda MacDonald
Dec. 11/90	Scholarships Available at the N.S.A.C.	Vic Saxon
Dec. 18/90	The Importance of Agriculture	Laurie Sandeson
Dec. 18/90	Sainte Famille Winery	Suzanne Corkum
Dec. 24/90	Specialty Fruits and Vegetables	Laurie Sandeson
Jan. 1/91	Dairy Goats - Milk & Cheese Products	Randy & Cheryl Hiltz
Jan. 1/91	O. H. Armstrong Ltd.	John Pierce
Jan. 8/91	Celebrity/Waiter A-La-Heart	Mary Elizabeth Stewart
Jan. 8/91	Food Laboratory Technology	Dr. Nancy Crowe
Jan. 15/91	Nova Scotia Mink Industry	Mike Johnson
Jan. 15/91	Atlantic Poultry Short Course and the Atlantic Poultry Conference	Alex Oderkirk
Jan. 22/91	Young Farmers' Conference	Bev Connell
Jan. 22/91	Agricultural Tour to Australia and New Zealand	Ralph Taylor
Jan. 29/91	"Teens Taking the Lead" Conference	Liz Crouse
Jan. 29/91	"Invest Some Time in Your Money"	Gail Keddy
Feb. 5/91	Manure & Agriculture Waste Mgmt. Seminar	Fraser Nicholson
Feb. 5/91	February - Meat & Restaurant Month and Heart Month	Linda MacDonald
Feb. 12/91	National Produce Marketing Convention	Laurie Sandeson
Feb. 12/91	Pork Industry and Meat Month	Mary Bewick
Feb. 19/91	Atlantic Farm Mechanization Show	Peter Swinkels
Feb. 26/91	Remote Bulletin Board Update	Ray Foote
Feb. 26/91	N.S.A.C. College Royal - 50th Anniversary	Carol Goodwin
Mar. 5/91	Export Mission to Boston	Brian Smith
Mar. 5/91	Nova Scotia Maple Industry Update	Dale McIsaac
Mar. 12/91	Strawberry Growers Association Update	Bob Murray
Mar. 12/91	Direct Marketing - From the Farms to the Consumers	Laurie Sandeson
Mar. 19/91	March is Nutrition Month	Karen Cole
Mar. 19/91	N.S. Federation of Agriculture	Bela Casson
Mar. 25/91	Garden and Patio Show - April 6 & 7	Myrna Blenkhorn
Mar. 25/91	Sustainable Agriculture Symposium - April 8 & 9	Dr. Phil Warman

VI. ADVERTISING

We placed 32 ads on behalf of the Nova Scotia Department of Agriculture and Marketing in such publications as daily and weekly newspapers, exhibition prize books, magazines, U.S. publications, etc.

1990 NSDAM Ad Placements

Publication	Ad Size	Cost	Message
Maritime Food & Beverage	1/3 page	$640.00	"Eat Meat & Win Campaign"
Chronicle-Herald Agri-Food Supplement	1/8 page	250.00	Message from the Minister
All Canada Sheep Classic	full pg.	150.00	Congratulatory
Musquodoboit Regional High School Grad Book	full pg.	100.00	"Discover... A Taste of Nova Scotia"
South Shore Ex. Program Book	1/2 page	220.00	"Discover ... A Taste of Nova Scotia"
Halifax Southender Magazine	1/4 page	260.00	Blueberry-Maple
Atlantic Beef	full pg.	306.00	Message from the Minister
N.S. Ayrshire Breeders Directory	full pg.	280.00	"Pride in N.S. Agriculture
Cumberland Co. Exhibition Prize Book	full pg.	40.00	"Discover ... A Taste of Nova Scotia"
Cape Breton Exhibition	full pg.	50.00	"Introducing Culinary Delights..."
Hants Co. Ex. Prize Book (3)	back cover	400.00	"Introducing Culinary Delights..."
Evening News (New Glasgow)	business card	86.00	In Celebration of Earth Day
Annapolis Valley Ex. Book	1/2 page	200.00	"Introducing Culinary Delights..."
Cape Breton's Magazine	1/4 page	275.00	"Introducing Culinary Delights..."
N.S./Nfld. Holstein Directory	full page.	654.00	full-colour photo Breeders and message
The Senior's Advocate	1/4 page	585.00	"Introducing Culinary Delights..."
Halifax Co. Ex. Book	full pg.	250.00	"Introducing Culinary Delights..."
Hants Journal	1/2 page	140.25	Farm Safety
N.S. Hereford Calendar	flag	75.00	Congratulatory
Weekly Record (Prov. Ex. Supplement)	1/4 page	182.31	"Introducing Culinary Delights..."
Northside Tribune	1/2 page	150.00	"Introducing Culinary Delights..."
(North Sydney) N.S. Prov. Ex.	full page	350.00	"Introducing Culinary Delights..."
Prize BookThe Packer (New England produce newspaper)	1/8 page	670.00	N.S.'s Horticulture Industry
Pictou North Colchester Ex. Program Book	full page	369.00	"Introducing Culinary Delights..."

Nfld. Food and Livestock Show Program	full page	300.00	"Introducing Culinary Delights..."
Atlantic Chamber Journal	1/8 page	275.00	"Agri-Food Basket" plus editorial
Atlantic Winter Fair Program Book	full page	975.00	"Introducing Culinary Delights..."
Chronicle-Herald	1/3 page	903.00	"Nova Scotia Red Meat Industry" plus editorial
Chronicle-Herald	1/8 page		"Inspected Meat Plants Assn. of N.S."
The Produce News	1/8 page	567.00	N.S.'s hort industry
N.S. Guernsey Breeders Directory	full page	550.00	Congratulatory
Chronicle-Herald	1/8 page	331.00	special maple feature

VII. SPEECHES AND PRESENTATIONS

Blueberry Producers Association of Nova Scotia Annual Meeting

We summarized promotional activities for 1990 and presented a slide show on the fresh campaign in August with the assistance of Heather MacKenzie.

Taking Care of Business Conference

We spoke on the topic of "Marketing Strategies" at this event sponsored by the Federal Business Development Bank for women in business.

Canadian Agricultural Extension Council Meetings

The national meetings were held in Truro in 1990. We joined fellow members of the Nova Scotia Agricultural Awareness committee in presenting some of our committee work to date.

Atlantic Poultry Short Course

We spoke at the week-long short course organized by the Nova Scotia Department of Agriculture and Marketing. The subject of the presentation was "Poultry Marketing - Today and in the Future".

Maple Producers Annual Meeting

We presented a summary of the promotion and advertising projects completed in 1990 and proposed several activities for 1991.

Strawberry Growers Annual Meeting

We prepared a slide show which highlighted the various consumer-related strawberry promotions held throughout the 1990 marketing year.

VIII. CONSULTATIONS

Individual consultations included:

1. *Jan Mar Quality Foods* - We met with the two individuals who have developed this condiment business and they are now interested in expanding. We discussed labelling, marketing strategy and promotional efforts.

2. *Sunline Natural Products* - We visited Mr. Gerald Lawrence, owner of this newly formed company. He was anxious to explore the export potential for maple syrup, honey and other specialty products. The company has since printed a maple syrup information brochure and has participated in a NEBS mission to Boston.

3. *Organic Crop Improvement Association of Nova Scotia* - We met with Neil Van Nostrand, an organic vegetable producer in the Valley, to discuss his exhibit at Canada Day celebrations in Ottawa.

4. *Aquaculture* - We met with Mr. Doug MacDonald, a consultant hired to develop a national marketing organization for Canada's aquaculture industry. We spoke mainly about the structure of WBANA.

5. *Canadian Living* - We met with Marg Fraser, food writer, to discuss the history of food in Nova Scotia and trends for the future. She is writing a book about food through the decades in regions throughout Canada.

6. *Maple Ridge Farm* - We met with Dr. and Mrs. George Cook on several occasions to discuss new maple packaging, market opportunities, etc.

7. *P.E.I. Dept. of Agriculture* - Along with the Foodservice Marketing Specialist we met with Nancy George, Extension Marketing Specialist in P.E.I., to discuss some of Nova Scotia's agri-food promotions and p.o.s. materials.

8. *Halifax City Market* - We met with the research firm and market vendors in Halifax to discuss the final report of a study designed to establish a marketing plan for the city market.

Audio Visual

A/V Production/Technology

Sheila Ferguson
Information Officer

I. INTRODUCTION

As the workload and talents of the Audio Visual staff increased, the need for a formal policy statement became evident. A policy covering work priorities, copyright regulations, dubbing of pre-packaged video tapes, equipment loans, etc. was drawn up. After several drafts, the policy was approved by the Directors of the department branches.

As many of our jobs are created by non-marketing staff, having an approved policy statement has allowed our unit to run much smoother.

In the past year we continued to meet new challenges and broaden our knowledge. Much of the work was as a consultant and manager rather than having a direct hands-on approach. Part of this new approach was made possible due to the negotiations of a video contract with Government Services. We are now directly responsible for the smaller budget projects; large budget items are still tendered. This certainly gives us much more control and we believe our money is spent a little wiser.

This office continues to be challenged with creating new ideas for food photography poster shots. This is one part of my job that really excites me. We continue to read, explore new ideas and try new lighting techniques.

Being in contact with Information Officers in various government departments, I was a little surprised but very proud to see that Agriculture is keeping abreast with communications and the print medium.

II. PHOTOGRAPHY

This year we have compiled a table to condense the photographic materials that pass through this office and photo-related assignments which account for almost 65% of the job.

	MARKETING	NSAC	OTHER NSDAM	AGRI-RELATED GROUPS/ORG.	OTHER	TOTALS
Slide Library Requests:	16	3	15	14	2	50
Studio Assignments:	4	0	3	6	0	13
Location & Press Assignments:	9	3	38	12	0	62
Photo Enlargements:	20	0	25	15	0	60
Copy Stand Assignments:	50	0	100	25	0	175
TOTAL	**99**	**6**	**178**	**72**	**2**	**360**

A. Slide Library

The slide library continues to be drawn upon extensively. We have reached the point where the "general agricultural" shots must be updated this year to avoid overkill. The library has seen quite an increased use by other government departments (both federal and provincial). We feel with the decline in Government Services' library material, other government departments will continue to be drawn upon. This does not create a problem as long as proper procedure and credits for material being used are given.

Throughout the fiscal year this office filled 50 requests for 35mm transparencies, 6"x7" transparencies and black and white negatives. A total of 894 original photographic materials were loaned for use in slide shows, presentations, printed materials, etc. as well as duplication.

B. Studio Assignments

Food photography continues to take a large portion of time and priority. Our system of working directly with the Promotion and Foodservice Marketing Specialists plus the commodity person(s) seems to work very well. We include one planning day plus at least two shooting days for each assignment. The necessity for extremely superior product has been successfully conveyed to the commodity representative. Over the past year we became acquainted with the work of Blair Davis, of Blair Davis Photography Ltd, and to date we see significant improvements in the 16"x20" prints.

In our 1990 capital audio visual budget we purchased a new lighting system, and hope for good results in our upcoming red meat promotion shots.
In 1990 a total of 13 assignments were completed.

C. Location and Press Assignments

Location and press assignments continue to increase. Departmental staff have grown to rely on good quality visuals to enhance presentations, print material, etc. Often the request for a location assignment enables us to increase our library material.

This past year two branches were involved in an extensive branch staff identification program. Plant Industry Branch compiled a visual flow chart for display at Crop Expo. Extension Services have been featuring various divisions within the branch in the issues of Extension News.

This office compiled a rather extensive file on the Plant Industry Branch, as we produced a multi-image slide show for Crop Expo. This show was transferred to video for portability.

This year saw the completion of the Home Study Sheep Handling and Breeds Video. Part of the series of home study tapes was produced as a 35mm slides and transferred to video. As a result, we now have a healthy file of sheep breeds found throughout the province.

Ann Perigo, Information Officer with Agriculture Canada, and this office discussed sharing location and press related job assignments. Both Federal and Provincial departments would have complete access to press related items.

D. Photo Enlargements

Most of the photo enlargements are handled through this office, so we can keep track of the original negatives and transparencies. We are using Blair Davis Photography Ltd. and see significant improvements.

Many of the enlargements done in the past year have been promotional shots which help enforce the superior products being produced on Nova Scotia farms.

We are experiencing increased usage of our photographic materials from other government agencies - Statistics Canada, Agriculture Canada and Department of Tourism to name just a few. Under the Audio-Visual Policy Statement, the photo release form states very clearly our copyright policy, monetary values if photographic materials are lost or damaged and credit be given to the Department for all material used.

Two branches, Plant Industry Branch and Agricultural Development Division, have acquired several 16"x20" prints to decorate newly renovated office space. It is very gratifying to have our photos used to enhance these newly renovated offices.

E. Copy Stand Assignments

Work completed on the copy stand has decreased in numbers this past year. The graphic artist is creating excellent computer graphics which are replacing many of the inferior vericolor tables used in the past.

Lith continues to be very popular to create "title burns" and "special effect slides". By creating the artwork and developing the lith in-house these special effect slides can be created at a very reasonable cost.

III. VIDEO

Over the past twelve months this office has been actively involved in the production of five video's. We have met extensively with Ned Norwood of Government Services to negotiate a video production contract that is signed between the Department of Agriculture and Marketing and a private producer.

It is no longer necessary to tender smaller budget productions through Government Services. We maintain a good working relationship with Government Services and appreciate the time and help Ned has given our Department.

For the three productions that we have completed with private production companies this office has acted as production manager, and had an active part in administering the contracts and budgets.

The three productions are:

- *Strawberry Nursery Program* - Chroma Communications
- *Maritime Dykelands* - Chroma Communications
- *Nova Scotia Sheep Industry* - Nova West Productions; this is a series of three home study tapes covering sheep husbandry, basic techniques of handling & lambing, and breeds found in Nova Scotia. This home study course is to be offered through the vocational office at NSAC.

All three productions were funded through the Agricultural Development Agreement.

The Department is the recipient of the "raw footage". We are now in the process of finding a climate controlled, fire safe storage facility to house this valuable library footage.

Due to a lengthy illness, two video productions have not been completed. "Kings County Agriculture" and "Crop Expo". The footage for these productions has been shot; but the final edit and final script are not completed. These two tapes will receive priority in 1991 fiscal year.

Under the Audio Visual Policy Statement, which came into effect last year, copyright regulations and the dubbing of packaged videos is clearly identified. This has cut down on the amount of dubbing handled by the audio visual technician.

One area we are still struggling with under the Audio Visual Policy Statement is the video taping of guest lectures, meetings, etc. We are hopeful over the course of this year we will refine and enforce our policy statement concerning the taping of meetings, etc.

For the present year, we have three proposals for video production, two involving the beef industry and the other, the Agricultural Industry in Colchester County (Agriculture Awareness). We are also aware of the necessity of good quality footage to be used by the Agriculture in the Classroom Committee.

IV. SLIDE SHOWS

This past year saw the completion of several single projector shows that were used by departmental staff (see table). The Promotion Specialist and this office have discussed the feasibility of producing a Marketing Services Branch slide show that would be transferred to video for portability. This presentation would be modeled off the "Plant Industry Branch" multi-image show which was completed this past summer for Crop Expo.

To date, Plant Industry Branch have made good use of the video tape. The professionals within our branch would probably get the most mileage out of such a presentation. By producing the series in 35mm slides and transferring to video, deletions, additions and general changes are easily made. When this project gets off the ground we will be looking to the staff for their input.

	MARKETING	NSAC	OTHER NSDAM	AGRI-RELATED GROUPS/ORG.	OTHER	TOTAL
Single Projector Shows	4	-	5	3	-	12
Multi-image Shows	-	-	2	1	-	3
TOTAL	**4**	**-**	**7**	**4**	**-**	**15**

V. SEMINARS & CONFERENCES

In October, we attended the *"Agricultural in the Classroom"* conference held in Saint John, N.B. Several resource materials are being put together by the Agricultural Awareness Committee; one item is a portable display panel. We anticipate this office will be supplying several "general agricultural" 16"x20" prints to travel with the booth.

There has been much discussion about producing a general agricultural video that would target the junior high school level. The tape would be educational and would highlight sustainable agricultural practices. This tape would replace "Meeting The Challenge" which was produced in 1985 and tends to be more promotional and filled with statistics.

The Promotion Marketing Specialist, a member of the Agricultural Awareness Committee, has discussed the feasibility of such a project with this office.

Crop Expo, which had been in the planning stages over the past two years, was held mid-July. This was an extensive effort between Agriculture Canada, the Provincial Department and the Federation of Agriculture. A three-day program was set up. One seminar day and two site days. The seminars, key note address and opening address, given by the Honourable Don Mazinkowski, were held at Acadia University. The equipment trials and plot trials were at the Expo site at Sheffield Mills.

We were responsible to co-ordinate the visual requests for the seminars. Video footage of the opening, the key note address, site opening and demonstrations were taped. We and Art Lightfoot, photographer for Agriculture Canada, are working on the production of a video tape giving a brief overview of the project. Due to illness this project has not been completed, but is expected to be completed by mid-June.

International Livestock Show was held in Moncton, N.B. in late October. An international livestock sale was combined with a two-day symposium. Over the course of two days, seven guest speakers participated. We co-ordinated the visual requests for the guest speakers. This event was also a good opportunity to add livestock slides to our library.

We also attended several one-day work-shops and seminars given in Halifax on new photography materials, a lighting seminar put on by ROSCO of Canada, and a product demonstration of the new MII video tape format. We attended a one-day seminar given on how to manage multi-priorities.

Graphic Design

Cheryl Kienzle, Graphic Artist

I. INTRODUCTION

The production of visual aids and materials, to enhance projects and programs associated with the Marketing Development section of the Branch, is a major objective of this office. In addition to providing assistance to the remaining sections of the Branch, this office also responds to numerous requests throughout the N.S.D.A.M. and related agricultural organizations.

The following report outlines some of the projects undertaken for the period April 1, 1990 to March 31, 1991.

II. ACTIVITY REPORT

The table below is compiled based on result indicators recorded throughout the fiscal year. It should be noted that several requests are too varied to categorize, therefore, the data is by no means inclusive. It is only a representation of frequency of the most routine services provided and **not time spent** on each.

	MARKETING	OTHER NSDAM/ NSAC	AGRI-RELATED GROUPS	OTHER	TOTAL FREQUENCY
Office Consultations/Meetings:	34%	48%	11%	7%	107
Design Layout/Mock-ups:	47%	38%	15%	-	72
Camera-ready Art (Mechanicals):	51%	42%	6%	1%	76
Hand Drawings, graphs, etc.:	35%	54%	11%	-	26
Signs/Posters/Cards/Tents:	22%	43%	35%	-	155
Lettering/Setting Type:	15%	85%	-	-	33
Computer Graphics:					
Files - for slides/overheads	38%	54%	-	8%	464
Slides produced -	55%	34%	-	11%	413
PMT's:	65%	33%	2%	2%	127

III. PROJECT HIGHLIGHTS

A. Consumer & Foodservice Shows/Promotions

Through the co-ordination of the Marketing Specialists, graphic services are provided to agricultural commodity associations, boards and related groups. During the year, an array of table-top tents, recipe cards, signs, posters, flyers, etc. were produced for use at promotions and trade shows. Following is a list of a some of these.

- Garden & Patio Show '90
- Harvest Food Fest 1990
- Maritime Pork Conference
- Garden & Patio Show
- Food & Beverage Show
- Blueberry Culinary Competition
- Seniors Expo '90
- Atlantic Winter Fair
- Swing Into Spring '90
- APEX
- Sea Sell

B. Advertisements

This office fulfilled requests for ad design in numerous agricultural publications, magazines and newspapers. A couple new Dept. ads "Pick of the Crop" and "It's in the Bag" were created this year.

C. Logo Designs

Each year, the need arises for new logos and/or the update of previous designs. The following is a list of logos completed for this fiscal year.

1. *Harvest Food Fest '90* - logo updated for '90.
2. *Hort East* - 3 designs/rough mock-ups were completed. A final decision is yet to be made on a finalized logo.
3. *Agricultural Awareness* - the final artwork was completed for this logo, designed last year.
4. N.S. Forage Council - modifications were made to the final design of this logo and camera ready material updated.
5. *Animal Science* - final artwork was prepared for this NSAC logo.
6. *Commercial Meat Rabbit Producers Assoc. of N.S.* - several designs were created and a final logo was completed, "Nova Scotia Rabbit".
7. *Visual Identity* - several of the Department Branch signature names were modified due to the restructuring of the Department.

D. Brochures/Books

1. *Lambtastic - Nova Scotia Lamb:* This 18-page recipe/supplier book was prepared for printing. Work involved word processing, editing assistance, formatting for typesetter, graphics, cover artwork and final mechanical.
2. *N.S. Apples & Pears* - A Part of our Food Heritage: This 21-page recipe/supplier book was prepared for printing. Work also involved word processing, editing assistance, formatting for typesetter, graphics, cover artwork and final mechanical.
3. *Table For Two:* This 8-page pamphlet was prepared for the Seniors Expo in July, promoting recipe selections from 7 commodity boards/associations.
4. *Nova Scotia Rabbit:* This recipe brochure was prepared for the Commercial Meat Rabbit Producers Assoc. of N.S.
5. *Atlantic Fresh Produce Association:* This directory/listing brochure was prepared for printing.
6. *Taste of N.S. Recommended Dining Establishments 1991:* This 40-page book was prepared for printing. Work involved all text formatting, typesetting, paste-up and some editing.

7. Pour it on! Mmmmaple: Word processing, typesetting, cover design and graphics were completed to prepare this recipe/information brochure for printing.
8. 17th Annual Maple Syrup Festival: This brochure was prepared for printing, listing the 21 maple suppers and 22 participating maple producers. Work involved word processing, typesetting and layout, graphics and pre-printing work.
9. Farmers Market: A new brochure was designed and prepared for printing.

E. Promotions

Commodity Promotions:

1991 Maple Festival - In conjunction with the maple festival suppers, a "Pour it on! Mmmaple" 9"x12" poster was designed and prepared for print. This same theme was also utilized in a design for use on aprons. Also, a maple information/recipe card was designed and prepared for printing. This small folded card was designed for attachment to maple syrup bottles.

N.S. Egg & Pullet Producers Marketing Board - with the photography of Sheila Ferguson, a menu blank was designed and prepared for printing.

Strawberry Growers Association of N.S. - a strawberry over-wire poster and menu clip-on were prepared for printing.

Blueberry Producers Association of N.S. - a blueberry price card was prepared for printing.

Meat Month & Restaurant Month:

This years campaign, once again, involved the preparation of promotional materials. This included a flyer/order form mailer, an invitation for the media and trade luncheon, and also menu inserts which were offered to restaurants during February's Meat Month.

Harvest Food Fest '90:

A poster, flyer, reception tickets and exhibitor/staff tags were prepared for printing.

IV. CONCLUSION

The task of compiling a report on the dissimilar jobs performed throughout the year is not always an easy one. The sources of requests are as varied as the methods used to fulfill them. Routine tasks have remained somewhat the same over the past 10 years, with occasional changes. The rapid spread of technology has played an important role in adding various techniques to the field of graphic arts. In the last 5 years, this office has seen many changes. More time is spent at the computer terminal than at the drafting table. The tedious, old-fashioned methods once used by graphic artists are no longer a "pain in the neck" (so to speak) when changes must be made.

In the beginning, this office performed many tasks for few persons. Now there are many persons with selected tasks. The ability to adapt and change this position to accomodate staff throughout the years has been one of the most beneficial aspects to this position. The ability to create, change, learn and grow has made serving Nova Scotia's agricultural industry an enjoyable task.

Radio/Audio Visual Services

Micheline Gibson, Audio Visual Technician

I. Reference Library

This past fiscal year this office has been involved in cataloguing the reference materials for this Branch. After looking over various methods of cataloguing, we chose a simple and effective system which is suitable for this Branch. In February we attended a workshop which dealt with various reference library software. We found the Papyrus software met our needs for quick and easy access to the material; it is also adaptable to a hard disk drive microcomputer or the VAX system. A copy of the software was purchased for the VAX and, presently, we are entering the reference library data and hope to have everything entered and working by summer.

II. Inventory

Inventory equipment checks are conducted on a regular basis along with additions and deletions.

Bulk Purchase Order of Audio-Visual Supplies

This office co-ordinates and prepares a bulk purchase order for audio-visual supplies for all the Branches of the Department. This year the total cost of supplies was $11,199.14 of which $10,186.80 was charged back to the various Branches through a system of interdepartmental invoicing and processed by Financial Services.

III. Video and Audio Dubs (Copies)

Video dubs	104
Audio dubs	39
Video edit	1
Video edit and voice over	2
Slide show recorded and pulsed	3

IV. Other Duties

Troubleshooting calls	11
Instructions re cleaning and maintenance	8
Trips to deliver equipment for repairs	9
Translation	4
Repaired and spliced 16 mm films	5

This year we checked and cleaned 680 pieces of audio-visual equipment belonging to Audio-Visual and other Branches. Some of these pieces also needed minor repairs.

We worked with a student from Gambia to provide him with some knowledge and tips about

audio-visual equipment and also how to conduct an interview, record, edit and produce a radio broadcast. This was at the request of the Nova Scotia Agricultural College.

Lauranne Sanderson - students: recorded four of her students and provided assistance with synchronizing their slide show.

4-H Summer Assistants: conducted yearly session for the summer assistants, recorded them and provided them with tips in conducting their summer radio programs.

V. Radio Services

This year there were 454 recording sessions which were edited for errors and adjusted for length to stay within the allocated time.

85	interviews with Laurie Sandeson as hostess
4	monologues with Laurie Sandeson
4	monologues by Department staff
6	interviews with N.S.A.C. Information Officer and guests
7	interviews and monologues for Radio Gambia
12	interviews with Orv Pulsifer and guests for "Trees and People"
38	monologues with Orv Pulsifer for "Trees and People"
52	monologues with Gail Keddy, Home Economist
52	monologues with Bill MacLeod, 4-H News
52	monologues with Agricultural Representatives
142	monologues with Orv Pulsifer for "N.S. Garden Guide"

Radio Tapes Reproduction

This year 871 reel-to-reel tapes were produced and mailed to subscribing radio stations throughout the province.

Nova Scotia Garden Guide Series:

5 cuts per tape for 13 radio stations for 26 weeks	338
promo tapes	13

Nova Scotia Agriculture & Marketing Update Series:

4 to 6 cuts per tape weekly for 9 radio stations for 52 weeks	468
Agricultural Representatives weekly tapes for CKCL	52

Nova Scotia Garden Guide

We are beginning our 13th year for this popular radio series with Orv Pulsifer as narrator. Typing of scripts and box covers on Garden Guide letterhead are part of the production process along with a cassette of all broadcasts which is sent to Dick Morton for loan-out to the garden clubs throughout the province.

Trees & People Series

This series with host Orv Pulsifer is starting its second year. It is prepared by Forestry Canada.

It consists of three monologues and one interview per month. It is included weekly with our Nova Scotia Agriculture and Marketing Update tapes.

Equipment Loans

Equipment loans were down from the previous year due to other Departments purchasing their own equipment. There were 49 audio-visual equipment pieces loaned out on term loans and 729 audio-visual equipment pieces loaned out for the year April 1, 1990 to March 31, 1991.

	DEPARTMENT		COLLEGE		TOTAL
	Short	Term	Short	Term	
Ringmaster projectors	20		7	4	31
Carousel projectors	84		34		118
Overhead projectors	69		26	11	106
16 mm projectors	3	1	9	21	34
Cameras	19	4	4		27
Sound systems	24		5		29
Tape recorders	9	6	12	2	29
Screens,flip charts,etc	265		59		324
Films, videos	52		20		72
TV, VCR, microwave oven	8				8